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Executive Summary

Building Design Partnership (BDP), Urban Space Management (USM) and MVA were commissioned by the Royal Borough of Kensington and Chelsea (RBKC) in May 2005 to undertake a regeneration study for Golborne Road. In parallel RBKC commissioned a complimentary study by 'intelligent space' (IS) to analyse pedestrian movement.

The aim of the study is to consider the future of Golborne Road focusing both on design and business related issues. RBKC provided a wide brief to the project team with the main provisos being that the road should retain its interesting and lively atmosphere, and remains a place where the needs of locals and visitors are catered for.

The methodology for the study comprises three key steps:

1. Analysis and Issues
2. Stakeholder Consultation
3. Identifying Options

Analysis

The first step of the study was to undertake an analysis of Golborne Road as it exists. This included gaining an understanding of physical and economic issues that affect the area.

Physical Characteristics

The physical analysis considered issues such as land uses, legibility, movement and public realm to provide a picture of how the street works. At a general level, Golborne Road was found to be an eclectic and interesting urban environment, heavily influenced by the large local Spanish, Portuguese and Moroccan communities. At a more detailed and practical level, the street itself is wide in comparison with other surrounding streets such as Portobello Road. This allows vehicles to both double park and when the street is quiet to travel at high speed.

The main landmark in the area is Trellick Tower and there are a number of more local attractions such as the Lisboa Patisserie that draw people from afar. The street is used intensively by the shops who often display their wares on the pavement, by cars and vans that park along it and by the market that is operational on all days of the week other than Sundays and Thursday afternoons. As a consequence, a level of conflict arises between the various uses which requires to be addressed if the street is to become more attractive and economically viable.

Economic Context

Property ownership, rent levels and shop vacancies were explored, together with the role and type of market that operates in the street. The majority of units along the northern section of the street are either owner occupied or owned privately and rented. The south side of the street, however, is predominantly owned by the Council. Rent levels vary from £538-£860/m² with premises on the northern side of the street being more expensive. All rents are low in comparison with other nearby retail locations such as Westbourne Grove where £2,368/m² is the norm. Despite the lower rental levels it was generally found that many of the businesses along the street are struggling to remain economically viable. A number of units along Golborne Road are presently vacant but rather than this being due to a lack of demand it was found that these are mainly due to owners awaiting redevelopment.

The market represents an important element of the identity of Golborne Road. The market operates on all days of the week other than Sundays and Thursday afternoons, with Friday and Saturday being the busiest. It mainly provides for the local community through the selling of hot food, fruit and vegetables but also attracts people from around London and the antique stalls are particularly popular. The market has 72 pitches of which only 35 are used on a regular basis. Van parking associated with the market is an issue as although the stall holders find the vehicles useful for storage they obstruct the retail frontages and limit on street parking for shoppers. Trading levels are not high and the study found that the level of footfall was insufficient to support national or chain stores and that the market brought vital numbers to the shops in the street.



Consultation

Consultation was carried out with a variety of different groups that use the street. These included businesses, residents, customers and other key stakeholders. At a general level it was found that the community has a strong connection to the street and enjoys the vibrant mix of people and family run retail outlets. In addition to this, it became clear that the market is an integral part of the street and that its removal would be unpopular with traders and shop keepers who see the market as competition but also as a draw to the area. Parking was highlighted as a problem both in terms of the ability of those with cars to park and shop and the conflict that occurs between those who legitimately park in a parking bay that at the same time has been rented by a market trader!



Developing Options

Following analysis and preliminary consultations, a series of development options were examined. These can be broadly categorised as:

1. No Intervention
2. Cease Market Trading and Improve the Public Realm
3. Improve the Retail Environment, the Public Realm and the Market

1. No Intervention

This option involved retaining the status quo and allowing the street to evolve without any planned or managed direction. This approach would fail to address the inherent problems of the street and market, and will almost certainly lead to further deterioration of the area.

2. Cease Market Trading and Improve the Public Realm

This proposed the total removal of market trading linked to improvements to the public realm and the creation of additional parking spaces. This option would create a more simplified urban environment with the opportunity for wider pavements, additional trees and further parking spaces. However, it may not retain the character and identity of the street as it exists, a key component of its future success in attracting people to the area. This approach could also undermine the rent and value of existing properties, including those of the Council.

3. Improve the Retail Environment, the Public Realm and the Market

This option seeks to build upon the existing attributes of the road and through improvements to the street and market seeks to realise the potential of the area. This option proposes the introduction of specialist markets, a new market management structure and the enhancement of the streetscape and building frontages. It is considered that this approach achieves the important objectives of both retaining the character of the street and ensuring economic viability.

More intensive patterns of street activity are common in many European towns, where a daytime food market will transform itself during the latter part of the day into a location for outdoor cafés and restaurants. The old marke in Nice provides an excellent approach to patterns of use that change through the day. We believe this is possible in Golborne Road, particularly in respect of the ethnic mix, different customer bases and potentially more visitors.

Adjusting cross-street dimensions to assist change

	Building Frontage
	Pavement (4m)
Carriageway (12m)	
	Pavement (4m)

Existing Situation

	Wider pavement (7m) outdoor retail / food / cars /tree planting
	Narrower Carriageway (6m)
	Wider pavement (7m)

(2) More Generous Public Realm, all surfaces would be 'flush' to create the feeling of a more continuous space

	Building Frontage
	Pavement (4m)
Carriageway (12m)	Car Parking/Stalls
	Car Parking/Stalls
	Pavement (4m)

(1) No Intervention, pavement/carriageway unchanged

	Cafés / Shops (1.5m)
	Moving (3m)
	Trading / Parking (2.5m)
	Carriageway (6m)
	Trading / Parking (2.5)
	Moving (3m)
	Cafés / Shops (1.5m)

(3) Enhanced Market Trading Zone, café frontages/parking. Again all surfaces would be 'flush' to create the impression of a more continuous space

1. Introduction

Building Design Partnership (BDP), Urban Space Management (USM) and MVA were commissioned by the Royal Borough of Kensington and Chelsea (RBKC) in May 2005 to undertake a regeneration study for Golborne Road. Additional information relating to pedestrian movement was prepared by Intelligent Space Partnership.

The aim of the study is to consider the future of Golborne Road focusing both on design and business related issues. RBKC provided a wide brief to the project team with the main provisos being that the road must be kept open to two-way traffic and should retain its interesting and lively atmosphere where locals needs are still catered for.

The methodology for the study comprises four key steps which are as follows:

1. Analysis and issues
2. Consultation
3. Developing Options
4. Identifying a Preferred Option

The study also addresses a number of key areas that surround Golborne Road which include the northern end of Portobello Road, Munro Mews and the space in front of Trellick Tower which for the purposes of this report will be named as Golborne Square.



Golborne Road looking towards Trellick Tower

2. The Context

Golborne Road is a vibrant and interesting retail and market street located towards the north of the Royal Borough of Kensington and Chelsea.

The street sits within a mainly residential environment and serves the needs of local residents as well as others in London who travel to use a number of the specialist food outlets. The northern end of the famous Portobello Road and its associated market connects with the southern end of Golborne Road.

To the north of the street is the Wornington Green Estate and park which is currently being considered for regeneration. Moving north along Golborne Road the street crosses the Great Western Railway line before opening out into Golborne Square in front of Trellick Tower. Further north is Meanwhile Gardens which allows access to the banks of the Grand Union Canal and a well used pedestrian link to Paddington Basin, Sainsburys and the Harrow Road shops.

The street is well served by public transport and can be accessed via Ladbroke Grove and Westbourne Park underground stations as well as a number of bus routes that pass in close proximity.



Golborne Road in its context

3. Consultation

A fundamental element of the study was the consultation process which was aimed at gaining an understanding of the issues and problems of Golborne Road.

The consultation was undertaken at the start of the project and encompassed the following:

1. Key stakeholder interviews
2. Business Surveys (traders and shop keepers)
3. Customer Surveys
4. Residents Feedback from Consultation Event

Key Stakeholder Interviews

Over 40 stakeholder interviews were undertaken over a 3 week period. This included contacting and meeting with all relevant organisations/people (such as interest groups and ward councillors) that were highlighted during the interviews with council officers. Due to the wide variety of people interviewed and their differing perceptions and stand points in relation to the street it is difficult to give a general overview of everyone's views. The points below provide a selection of views expressed by the interviewees:

Economic Issues

- Traders Association should be re-introduced
- A BIDS system should be considered
- Creative workspace is required
- Conflict between some of the shops and the market stalls
- Potential for a new type of market (fashion)
- Sainsburys takes most of the local trade

Physical

- Residential uses should be encouraged at first floor level
- Basements are under used
- Undercroft on Golborne Square could be used for café
- Traders like to locate themselves on Portobello Road rather than Golborne Road

Traffic and Parking

- Policing and enforcement needs to be improved
- Vans are a big problem
- Traffic moves along the street at high speed
- Double parking is an issue
- Pay and display is confusing because pitches can also be located in the parking spaces

Management

- The Portobello Management Committee deals primarily with Portobello Road market

- Due to the governmental act covering London's Street markets it is not possible to promote the market
- Market traders can be difficult to deal with at times
- Rubbish from shops is an issue because they put it in bins that are designated for the market
- The waiting list for pitches along Portobello Road is so long that the list has been closed. It was suggested that all those on the list should first locate in Golborne Road until a space becomes available along Portobello Road.

Business Surveys

Below are main results from the Shop keepers and Market Traders' Survey which were undertaken over the summer months, on a wide range of weekdays and Saturdays.

- There are 112 shop frontages, of which 88 were surveyed.
- Approximately 32 market traders operate in the street, of whom 16 have been surveyed.
- There is a wide range of businesses, from butchers to bespoke interior design. 24% sell food and provisions, 15% are in pubs/restaurants and cafes, 14% in antiques and second hand, 12% in services and 5% are hairdressers.

The major draws for Golborne Road are considered to be:

1. Diversity of shops/businesses (21%)
2. Market (19%)
3. Ethnic diversity of the community (15%).
4. Portobello Market (13%)
5. Atmosphere & vibrancy (13%)
6. Cafes (10%). The Lisboa is mentioned more than others with 4% of the total.

The main positive points are considered to be:

1. Diversity of the shops/businesses (16%).
2. Atmosphere & vibrancy (14%).
3. Ethnic diversity (13%).
4. Community spirit (12%).
5. Market (12%, of which 4% mention Portobello Market).
6. Cafes/food (5%).

The main negative points are considered to be:

1. General parking issues (35%, of which 8% relate to lack of parking for businesses, 6% lack of parking for shoppers, other points raised include double parking).

2. Crime/drugs (17%).
3. Cleanliness and rubbish (9%).
4. Traffic moving too fast (8%)
5. Change taking place (gentrification and unsuitable new businesses – 4%)

The main improvements suggested are:

1. General parking improvements (32%) Of which 8% are for business parking permits .
2. Rubbish and cleanliness (12%).
3. General market improvements and more stall variety (12%)
4. External improvements to the street (9%).
5. More Policing/CCTV (9%)
6. Traffic calming (5%).

Businesses and customers

- The majority of businesses have been in existence for over 10 years (66%). 10% are up to a year old.
- A high proportion of business owners live locally (32%) or in the wider area (55%).
- Most are sole traders (71%) while (17%) are limited companies.
- Most aim to continue trading (8 do not due to poor trade) and either stay the same in terms of size, or increase. 10% reckon that they will reduce in size.
- 61% of the businesses have leases (with over 10 years left). 18% have less than 3 years remaining. The market traders are all on annual licence agreements.
- Most customers are regular (65%) of which 42% are locals and 23% come from the wider London area.
- Over the last 3 years trading patterns have been lower for almost half (48%, with 6% of those doing much worse). 34% have been doing the same level of business, while 18% have seen an improvement.
- For footfall levels in the last 2 years, 2% consider it to have declined a lot, while 39% consider it to be less and 42% the same. 17% consider footfall to have increased.
- Reasons for changes to trading and footfall patterns were largely unknown, though those that mentioned negative aspects noted the difficulty loading and unloading and other parking issues, along with increased levels of crime, higher rent and rates and the poor economy. More positive aspects mentioned included a reduction in crime (in particular the drug dealing in front of shops has been severely reduced in the last 2 years) due to a local CCTV and crime initiative.
- The busiest trading days are Fridays and Saturdays (for 75% of the businesses) while Wednesday is the least busy day.

- Most do not advertise (66%), and several noted that they rely on word of mouth more than anything else. For those who do advertise the most used forms are the local papers and magazines. A small percentage manage their promotions by getting features and mentions in editorials.
- Most of the shops are open 6 days a week, while the market traders are mainly operating from Wednesday to Saturday. A small number of the shops open on Sundays.
- For staffing levels, 39% of the businesses have 1 full time member of staff, while 18% have 2. 77% of the businesses have fewer than 5 employees. One business employs over 25 people. 18% of the businesses have 1 part time member of staff.
- Impact of Congestion Charge - the majority see this as a threat (70%), with less trade and very negative impact. 5% are unconcerned.
- Traders Association - most say they are interested in getting information (85%) and participating (62%). Half the market traders said that they did not know about the Portobello Management Committee, while one said he was interested in taking part in it.
- Business Improvement District - the majority of businesses are not interested in a BID (81%). They consider that they pay enough Rates already and organising this would be over complicated. 19% said they liked the idea and would need more information on it.
- Property - the upstairs areas are mostly used for residential (92%), with some commercial. 3 are not used.
- There were some separate questions for the market traders. They use a mix of ways of parking – including pay & display, on street in market pitches and in the wider area. Most pack their stalls away at night and they use a variety of ways to store their goods (including shops, home, vans, Munro Mews units). For power there are also a variety of ways of getting it – from using the street bollards (very few work and fewer have accounts to use them) and taking power on agreement from shops. Most on the South side have never had power and the currently traders are not too interested in having it.

Other ideas on the development of the street

Retail:

- The majority wish to keep the retail with the general interesting mix of shops
- Some suggested trying to get a bank or at least cash machine (that does not charge when used).

Market:

The majority of comments made related to the Market.

- Fill the stalls
- Have more market days (e.g. Sundays to avoid the Congestion Charge)
- General improvements
- More variety on the stalls to diversify the overall offer in the street

Parking:

- Many suggested dealing with the detailed problems that they outlined earlier in the survey.
- Very few agreed with cutting it out or stopping through traffic

Policing:

- Many wanted more and constant policing.

Other comments were:

- Leave it as it is
- Do not “yuppify”
- Tidy it up.

In 1996 a business survey was undertaken by Donaldsons for City Challenge. This is the only comparative survey that has been undertaken in the area. While not really overlapping with our work, they found that almost 2 thirds of the retail businesses did more trade at the weekend and almost 3 quarters considered that the market was an asset to the area. The majority considered that most visitors came because of the market rather than being drawn by the shops. At that time, car parking was the major concern for businesses, followed by congestion around the market. Market traders considered that their customer base was from London (39%) or from abroad (49%). That market trader survey was dominated by antique traders.

Customer Surveys

On-Street customer surveys were carried out with 337 people visiting Golborne Road. Interviews took place on Saturday 25th June, Sunday 26th June, Tuesday 28th June and Friday 1st July.

The survey sought to discover:

- who visits Golborne Road;
- where visitors to Golborne Road come from;
- how visitors travel to Golborne Road;
- why people visit Golborne Road;
- what draws visitors to Golborne Road; and
- what facilities visitors use at Golborne Road.

The survey also asked visitors to Golborne Road:

- how they had first heard of the area;
- the best and worst things about the area; and
- what, if anything, they would like to change about the area

Summary of Findings

Two thirds of visitors to Golborne Road live in the local area, defined as within walking distance of the street (67%). A little over a quarter of visitors come from elsewhere in London (27%) and a further six per cent are visiting from elsewhere in the UK or overseas.

The main reason for visiting Golborne Road is to visit local shops (29%), followed by visits to the market (19%) and then to eat or drink at a local café, restaurant or pub (15%).

Visitors who patronise local shops or the market in Golborne Road are most likely to be shopping for food items. Other regular purchases such as newspapers and lottery tickets are also specified as purchases from local shops. Non-food or regular purchases are most likely to be clothes, shoes or accessories with thirteen per cent of shoppers making this purchase from local shops and over a third of visitors making a trip to the market for these items (35%).

The great majority of visitors to Golborne Road (94%) are on a day trip. A little over four per cent are on holiday and the remaining visitors are on business in the area. Most visitors to Golborne Road visit the area more than once a week (59%).

Visitors are most likely to be staying in the Golborne Road area for more than two hours - (48%) and then for up to one hour (35%) with the remainder of visitors in the area for between one and two hours.

Sixty per cent of visitors walk to Golborne Road. A little under a quarter of visitors reach Golborne Road by public transport using either a bus (13%) or a tube or rail service (10%). Sixteen per cent of visitors come by car and a small proportion of visitors cycle to Golborne Road.

A little over half of visitors to Golborne Road know of it because they currently live in the area (52%), with a further ten per cent having grown up in the area or known the area for some time. A little under a fifth of visitors have been specifically recommended to visit the area and a further eight per cent had heard about the area through press coverage or a guide book.

Visitors generally have very positive things to say about Golborne Road and few can name something they would like to change about the area.

Visitors say the best things about Golborne Road are the people and the community atmosphere (18%), with a further fifteen per cent specifically mentioning the diversity and multi-cultural nature of the area. Eighteen per cent of visitors say the market is the best thing about Golborne Road.

The worst thing about Golborne Road relates to crime, whether this be awareness of a high crime rate, shootings, violence, drug crime or muggings (20%) but encouragingly a similar proportion of visitors (19%) say nothing is bad about the area. A further fifteen per cent say the worst thing is that the area is dirty or smelly or there is a lot of rubbish around.

When asked what they would like to change about Golborne Road over a third of visitors say either nothing or they do not know (35%). Sixteen per cent would like the area to be cleaned more regularly. Thirteen per cent would like to see measures to make the area safer including more police and CCTV. Eight per cent would like traffic improvements including traffic calming and more parking.

Half of visitors to Golborne Road (50%) are aged between twenty one and forty years. A little under a quarter of visitors are aged between forty one and fifty five years (24%).

Two thirds of visitors to Golborne Road (66%) are of white ethnic origin. A little under a fifth of visitors are of black ethnic origin (19%). The remaining fifteen per cent of visitors are of mixed, Asian or other ethnic origin. Similar proportions of males (53%) and females (47%) visit Golborne Road.



In the 1996 Donaldsons customer survey of Portobello Road, 800 interviews were conducted in the summer period. Again as in the business survey, different questions were asked and there is only some overlap in findings. 36% of visitors were there as part of a tourist trip with 93% of those not living in London, but quite a high proportion were staying locally as part of their trip. 43% travelled from hotels (particularly to the antiques section). 41% travelled on foot, and 28% by tube. The market was seen as the main customer draw (by 69%) while 21% came just for the shops - particularly the food shops. 43% come once a week or more, with 27% coming for the first time. 86% knew of the markets through living in the area or word of mouth. Visitors were most satisfied with its accessibility, its convenience provision (groceries), the range of antiques, the quality of the street environment and the eating and drinking offer. The main deficiencies were its lack of amenities (toilets and places to sit and rest) and there was considered to be scope for improvement in its cleanliness and pedestrian congestion.

Residents' Feedback

A public consultation event was organised on 28th June 2005. The event was advertised in the local press, in shop windows along Golborne Road and through leafleting along the street and all adjacent streets. The event was held at the Venture Centre and organised as a drop-in allowing people to arrive and leave as they wished. Facilitators carried out interviews with those who attended thereby gaining an understanding of their views and aspirations.

This is a summary of the comments received:

What do you feel about the street, shops and market and why?

- The variety and friendliness
- Brilliant eclectic mix of great food shops and market
- Culturally diverse
- Community feeling
- Nice balance
- Easy access for local community
- Good set of local shops

What other services/shops/activities would you like to see?

- Organic fruit and vegetable shop
- Cafés are good but not good enough
- Local people do not want change
- Shops should be done up
- Need more activities for the elderly

What would you change?

- Enforce parking restrictions
- Better lighting
- Something to prevent double parking
- Tidy up shops
- There needs to be more public transport
- Better cleaning of the street
- Clean up railway bridge
- Bays need to be sorted out into either pay and display or trading pitches

How do you feel the market along Golborne Road should evolve?

- Like it as it is
- Encourage farmers market
- Needs more publicity
- Stall pitches should be cheaper
- Should be extended

What do you feel should be done with the space in front of Trellick Tower?

- Make into more parking for customers
- Café to sit outside
- Nice as it is
- Stalls and planters to cheer it up
- Outdoor performance space
- Farmers market
- Needs to be more welcoming and safer

How do you think pedestrian/vehicular movement could be improved along Golborne Road?

- Take out traffic on Fridays and Saturdays
- Double parking is a problem
- Enforce the parking restrictions
- Speeding is a problem
- It is a rat run
- Need more short term parking
- Slow/bad bus service
- Wardens only go out with police protection
- Pay and display areas are confusing

4. Analysis & Issues

The aim of this section of the report is to provide an understanding of Golborne Road as it was in the past and as it exists today reflecting upon:

1. Historical and Social Background
2. Socio-economic Analysis
3. Market/Retail Analysis
4. Physical Analysis

4.1 Historical & Social Background

Golborne Road and its environs is an area that appears always to have been in a state of change. It lies close to 3 unique transport routes; the Grand Union Canal, the Great Western Railway and the elevated A40. It has seen intensive development in the 19thC and considerable destruction during the 1940s. It has been rebuilt during the intervening period during which time it has seen the arrival of different ethnic groups.

A substantial West Indian community arrived in the 1950s and more recently the area has become home for Spanish, Portuguese and Moroccan communities.

The influences of these periods of almost continuous change are evident in the nature of the retail premises and this diversity of background creates a cosmopolitan feel that is one of the underlying strengths of the area.

This character and diversity is reflected in some of the retail on offer but is an aspect that has considerable unrealised potential.

4.2 Socio-Economic Analysis

It is important to consider the socioeconomic background of the area when undertaking a study of this nature.

The socio-economic statistics for the wider Borough are generally favourable but when those for the local area are assessed they indicate that earnings and employment levels are below the average. This indicates a less robust prevailing commercial environment in which inappropriate physical change could have significant economic consequences. (See Appendix 6).



Golborne's tightly packed terraces before redevelopment
Source: (Jerome Borkwood) Tales of the Inner City



Golborne Road, 1904
Source: (Jerome Borkwood) Tales of the Inner City



Market and Retail Analysis: An eclectic mix



4.3 Market/Retail Analysis

The market and shops along Golborne Road represent a key element of its character and vibrancy. This section provides an overview of the market and retail provision along the street including details of ownership and rent levels.

Retail

Currently there is a mix of different types of shops in the street. Including the North section of Portobello Road there are 112 shop frontages. Apart from the 3 betting shops owned by national chains every other shop is owned by an individual trader (including Costcutter) and this makes for an unusual street scene. The split of uses is as follows:

- Office/showroom - 7%
- Food retail - 11% (includes butchers (5%) greengrocers, grocers, supermarkets and fishmonger, patisseries)
- General local services - 36% (of which 9% are hairdressers and electrical goods - 2.5%, Newsagents - 3%)
- Hot food and drink - 18% (includes restaurants, cafés, pubs, bars, clubs, take-aways)
- Betting shops - 2.5%
- Furniture and antiques - 10%
- Clothing, jewellery, fabrics - 3%
- Advice centres - 3%
- Vacant/storage - 9%
- Arts - 5% (includes dealers / galleries, art goods & framing)
- Sports - 1% (bikes, skateboards etc)

Ownership: 54% of the retail in the area is privately owned (60 shops), the Council own 36 shops and 16 of the shops are of uncertain ownership. RBKC owns the majority of the South side of the street along with all the retail spaces under Trellick Tower. The majority of the north side and Portobello Road is privately owned. 18% of the shops are owner occupied, a number of which are multiple freeholders e.g. Lisboa, The Prices, Georges Fish & Chips and the Cash & Carry) and 36% of the shops are owned by private investors. A number of the long standing existing managers/owners are to retire in the next 3-5 years and their families may well not continue trading, so a change of ownership/use in that timescale is expected. The majority of the private owners that are represented by the locally active agent (Marsh & Parsons) take a long term view. They prefer to have tenants on 15 year leases and look to the future for rental growth (rather than trying to make the highest rents now). A few are seeking higher rents than the market can bear and consequently their shops are vacant.

Rent levels: Rents on the north of the street are £645-£860/m² Zone A (first 6m of shop) with higher levels closer to Portobello Road. On the south side of the street it is £538/m² Zone A near Portobello Road, which goes



Uses at ground level along the street

■ A1 (shops)	■ A2 (prof. services)	■ A3 (Restaurants)
■ A4 (drink)	■ A5 (Hot Food)	
■ B1	■ D1	■ SG

down to £409/m² Zone A by the bridge. The Trellick Tower end rents are approximately £182/m² Zone A. As there have been virtually no new lettings in this section for many years, the recent departure of the newsagent provides the Council with a chance to test the rent levels to achieve a more market oriented figure.

According to Marsh & Parsons, Zone A rents in Portobello Road are £1400/m² near Westbourne Grove, £1076/m² between Elgin Crescent and the Westway, and around £700/m² in the north part of Portobello Road compared to a maximum of £2368/m² in Westbourne Grove which is considered to be unsustainable as the footfall and business is not there. In Ledbury Road the maximum is £1830/m² Zone A and we understand that some shops are struggling. Rent incentives are apparently unnecessary in Golborne Road at present. Depending on the state of the shop, there is still a healthy letting market. Other than a good demand from betting shops, the current retail enquiries are not from nationals, multiples or chains. Most enquiries are for hair dressers and coffee shops. There is an interest in retail/showroom/workspace i.e non retail. This use is better suited to more tertiary retail areas e.g. this is occurring in the north part of Portobello Road.

The levels of rent and the business survey both show that while certain businesses are trading strongly, business levels in the street are low and would not sustain national chains. In addition those shops trading on purely local shoppers are particularly hard hit. Those that provide a local service as well as appealing to a wider catchment are performing better, in spite of the retail recession currently in place.

There is a strong sense of community amongst the retailers, which is unusual in London. This makes the street distinctive and is something not to be underestimated. The street has been through several retail phases in the last 15-20 years, each with the promise of improved lettings, higher rents for the owners and more viability for the shops, along with the threat of chains taking over. While capital values have increased across the whole of London and in particular in this area, the more upmarket retailers - those able to pay higher rents - are not moving in and there is not likely to be enough footfall to sustain them. Given the current recession in retailing, these sorts of changes are unlikely to take place soon in Golborne Road, but there will be a series of changes as owner occupiers retire and do not have family members or partners to take the businesses forward.

Several owner/occupiers are in a position where the capital value and the residential values on the space above are their pensions. Thus they are driven to go for the best return (currently from hairdressers and cafés), which means that there are temptations to have more of these uses - not because the street can sustain them, but because the owners depend on them for returns. In addition, there are several businesses on leases which are coming to an end and they are unlikely to renew. While the area is becoming more hip again - the boho and novel feeling of the area



Ownership
 ■ RBKC ■ Private on a lease ■ Owner Occupier
 ■ No information available

is attractive to creative industries in particular fashion and architects/designers - the fragility of retail is still evident. This reflects in the turnover of some of the shops, where design partnerships take them on and then dissolve and have to give up the shop. These sorts of retail act as a fringe to the retail in Portobello Road, and allows new businesses a start in a less costly area, but within its halo. It is interesting that the clothing and lifestyle shopping websites for London cover Portobello Road and do not yet include Golborne Road.

Vacancies: The majority of recent vacancies have been occurring on the North section of Portobello Road, where the shops are privately owned. There are a number of vacancies in Golborne Road itself, in particular beside the Lisboa on the North side and near Portobello Road junction and their owners have plans for these which will be implemented within 1-2 years. Those shops that are vacant for a long time are sticking as the owners are asking too much rent. Of the 7 restaurants in the area, we understand that one has recently closed and one other is considering closing due to lack of trade. There is certainly a decrease in the activity in the street at night, despite the presence of some trendy pubs and bars and the presence of the Spanish restaurant Galicia.

Neighbourhood Shopping Policy

The Council has a Neighbourhood Shopping Policy (NSP) which has been in existence for several years. This gives guidelines to the Borough Valuers when letting Council owned shops. This is an internal document, and in planning terms it is an informal policy. The driver for it is that there should be provision of neighbourhood/convenience shops for local people. By being somewhat flexible on tenant selection, the aim is to maintain the vibrancy of the Council's shopping parades.

The NSP outlines the steps that the Borough Valuer should undertake for letting vacant space. It seems to be a sensible approach of weighing up such things as financial ability, the potential use of the shop and the tenant mix in the local area. In particular where these shops are located beneath Council owned residential premises, there is further expansion of how lettings should be dealt with (including resisting changes from A1 general retailing to A3 (hot food) or where a shop is not considered to be a convenience use). The NSP outlines what is meant by "neighbourhood uses", providing a list of types of shop that fall within that category (e.g art shop, to baker, to florist, to music shop to TV rental shop), but this excludes cafes or restaurants. As shop uses change over time, the policy emphasizes that flexibility in interpreting use must be included. This is also required when looking at the balance of uses in the local properties owned by the Council. The final decision about the letting of a shop is taken by a Committee of Councillors who take the policy into account and work with the recommendations of the Borough Valuers.

The policy is currently under review. While the main body of the policy is likely to remain intact (as it gives enough flexibility to be a useful tool) the list of shops may be expanded.

The current policy of the Council is to promote a variety of trading outlets and to resist the introduction of a high proportion of bars, cafes and restaurants.

The NSP is in place to help with Council owned lettings rather than being a tool for overall retail management. It is not formally adopted as Planning Policy and where it is used to influence privately owned retail uses it is open to Appeal. This has occurred at 318/320 Portobello Road which while empty for several years was purchased by William Hill who applied for a betting licence earlier in 2005. We understand that the Council turned the application down on the basis of the NSP, but this is now going to Appeal.

Thus where privately owned shops are concerned, the NSP is not really able to influence lettings. However the Borough Valuers would take the uses in the street as a whole into account when undertaking lettings. For example there are 4 Halal butchers in Golborne Road at present, 3 in privately owned shops and one in a Council owned shop. It is unlikely that the Council would allow a vacant shop to be used in this way as they consider there are more than enough already. Where the officers have more than one offer for a vacant shop then they are able to pick the one that best relates to the NSP and local mix. Where they have only one offer for a vacant shop, they would need to look carefully at the balance between rent, use and neighbouring uses.

In using its ownership of many of the shops the Council can help steer the development pattern of the street (without necessarily taking the private owners along) and keep vital and local services going. The Council influence on the future of the street should be strengthened by adding in the management of the Market which could have a really positive influence on the retail direction of the street.

The Council can act in a benign manner as a landlord. This can encourage shops that add interest and vary the retail mix (itself vital to keep a shopping area being used). It is doing this already e.g. Rellik is a vintage clothes shop that sells designer clothing. A stepped rent approach was used to encourage this business. This allows a new type of business, that could be argued not to be serving just local needs, but wider ones, to grow. Crucially it brings a new type of customer to this part of the area and may help to bring new economic activity and in the longer term reflects the changing nature of the area, where many fashion designers are locating their businesses.

The NSP review should be undertaken in light of local and national influences:-

- Shoppers do not make their shopping decisions in line with Council boundaries. For example there is a large local Sainsbury's supermarket and many local shops in Harrow Road which take local trade from Golborne Road. The NSP cannot contain these outside forces.
- Many of the existing shops in Golborne Road are struggling. They find it difficult to survive on local trade alone and must rely on selling goods to a wider pool of customers. The work undertaken by Intelligent Space shows that most of the "local" shops are not considered to be viable when looked at from a footfall point of view and anticipate that cafes, take-aways, betting shops, newsagents and hairdressers are more likely to become established.



- Different interpretations can be put on whether certain types of shop are local e.g. a cafe. This has such a wide possible range of activity and its local impact depends on the management, that it has probably been left out of the NSP. Would an up-market delicatessen pass the test? This could be seen to be reflecting the changing nature of the immediate local population, an attraction for those who live in wealthier and yet still “local” areas, or not a local service at all.
- There are several Voluntary Organisations and office based users in Golborne Road. Currently they do not dominate the street scene and they bring customers to the street. We would recommend that they are included in the review of the NSP and ideally that no more are allowed in the main shopping frontage. Ideally they would be positioned in tertiary shopping areas (such as Portobello Road North) rather than this secondary shopping location.
- The NSP may well have an impact on reducing rental values. Rents are generally lower where restrictions are placed on lettings ability. Also on rent review an overly prescriptive user clause could keep rent levels lower than the full market value.
- One way of ensuring that shops remain in business is to keep the rents low and this is something that the Council can decide to do in order to protect the NSP or the local shop. But this can also encourage mediocre local businesses to survive longer than is sensible from a commercial point of view, and this can block other more viable and potentially local businesses from starting up.

Market

Currently the management of the street markets in the Borough is organised through the Markets Department which operates within the Waste Department. Their team have responsibility for Portobello Road along with Golborne Road and a number of other licensed pitches scattered around the Borough. The London Local Authority Act (1990 as amended 1994 and 2004) provides the statutory rules under which all street markets in London are managed. The key points within it are that Councils are able to:

- set up licensed pitches
- control the trading on them
- fees charged must cover the running costs of the market (a council is not allowed to make a profit on its street market operations but can charge administrative costs)
- promotion of markets cannot be included in the rental figure and must be paid for separately.

Once agreed it is a legitimate charge within the administrative fee

Golborne Road Market consists of 72 licensed market pitches, the majority of which are on Golborne Road itself. There are several pitches on the East side of the northern most section of Portobello Road, which for this study is considered part of the Golborne Road market. While those particular stalls are never used for market activity, there are around 35 traders using the Golborne Road pitches over the week. Saturday is the busiest market day with Friday as the other main market day, but with fewer customers. The market serves both local needs but also attracts business from a London wide public, in particular the second hand and antique activity. The Council issues licences where permanent traders get the right to have the same pitch for the entire year. Any rule or position changes are only possible to be undertaken on an a three year basis and as in all local authority run markets, traders can take complaints to higher levels of the Council than the site managers. The next renewal of licences will be in December 2007.

There are currently several different market activities on the Street. The Friday and Saturday uses that predominate are the second hand, bric-a-brac, tools and antiques on the south side of the street (37% of traders). The market activity is pretty low on Mondays, Tuesdays, Wednesdays and Thursdays when the only consistent stalls out are the 2 Moroccan hot food stalls, some of the fruit and vegetable stalls (13%) and the Islamic religious goods stall. On Saturdays the market grows with the addition of more hot food (17%) and food provisions such as bread (20%). There are a total of 13% of other stalls - such as one toiletry stall.

In 2005, permanent traders with a 6 day licence paid £49 a week (the same figure as on the busier Portobello Road) and then for casual traders, the fees were £10/day Monday to Thursday (half day) and £27/day for Friday and Saturday or £46 for both days. There were introductory rents for casual traders at Golborne Road. The fees were increased in 2006 and there are no longer any concessions. Currently there are around 22 traders with 6 day licences and 8 traders with 2 day licences, the rest are more casually based. Many of the 6 day licence holders do not trade for the full 6 days. There is a system in place for allocating casual pitches on Fridays and Saturdays (the Lottery Procedure) which is managed by the day managers.

Electrical power of sorts is available to a few stalls on the North side of the street. Access is via purpose designed bollards with an integral meter device. There is no power for stalls on the south side. In 2005, the Council suggested a 3% increase in the stall fee to cover bringing in more power, but the traders voted against this. In 2006 power was reorganised and improved. Those that use it pay for the service.

At present the arrangements of the market activity has an often negative visual impact on the street and shops, and also detracts from the market stalls. There are a good number of traders who park their vans on their neighbouring market pitch and there is confusion about whether this is

allowed or not. While it acts as a very useful storage facility, the impact is negative and it obscures shop fronts and closes off the street visually.

Several of the traders rent storage garages from the Council in Munro Mews. The Council do not provide any stalls and thus there is a range of stall styles on the street. Often nothing is used other than the ground especially on the South side of the street (e.g. for furniture) and there is a range of quality of display. Several stalls take space on the pavement reducing the walkway while others stick to the rules of not trading on the pavements. The 2 permanent Moroccan hot food trailers look dirty on the outside and use a variety of informal seating arrangements on the pavements. While their food is good, the stalls visual appeal is not positive.

There are very few (if any) fly pitchers as the Council enforcement team are very strong on dealing with them. While there is a hard-core of traders dedicated to Golborne Road (in particular the second-hand antiques, fruit & vegetable and hot food traders), the fortunes of the street wax and wane along with the success of Portobello Road. This directly affects the number of casual traders and hence the street has the impression of playing second fiddle to Portobello Road. For instance currently the list for t-shirts, clothing, jewellery and hot and cold food is closed at Portobello Road and thus none of these can be taken on at Golborne Road, even though this is a different place. Also, the PMC (Portobello Management Committee) which is the main consultation body on the area for the Council is made up of a group of traders, shop owners, Council officers and residents, until we identified the market trader to be involved in mid 2005, it had no representation from Golborne Road traders. While this is supposed to cover Golborne Road, the very name does not include it and the tenor of the business is all geared to the bigger neighbour. The recent omission of Golborne Road (and then its misspelling) on the posters advertising the markets in the area did not help with local relations, and sent the message that Golborne Road is not that important.

The Intelligent Space Study identified the importance of Portobello Road to generate additional footfall at the weekend. This however is tidal i.e. the north part of Portobello Road, is used mainly as an overflow for the busier parts of Portobello Road. The stalls provided on this section are all rented from Countrywide who manage the Portobello Green market and at least gives the appearance of similarity, even though there is a large variety of goods on offer. One key problem with this section of the street is the poor lighting there, and there is no power to the stalls. Thus in winter time (the key retail time of year), traders are in the dark from 3.30 pm and start to pack up early in the afternoon. This lack of light and early packing up is very off putting for any customers who are considering venturing north to Golborne Road.

Conclusions

We believe that Golborne Road has a unique character both as an existing market and retail area that sets it apart from Portobello Road. While it will always be heavily dependent on Portobello Road, Golborne Road has the potential to become more of a draw in its own right.

Current Changes to other London Markets

Many London markets are currently going through something of a renaissance. The provision of food in particular has led this revival. This is seen through the rise of farmers markets such as those in Marylebone and Pimlico.

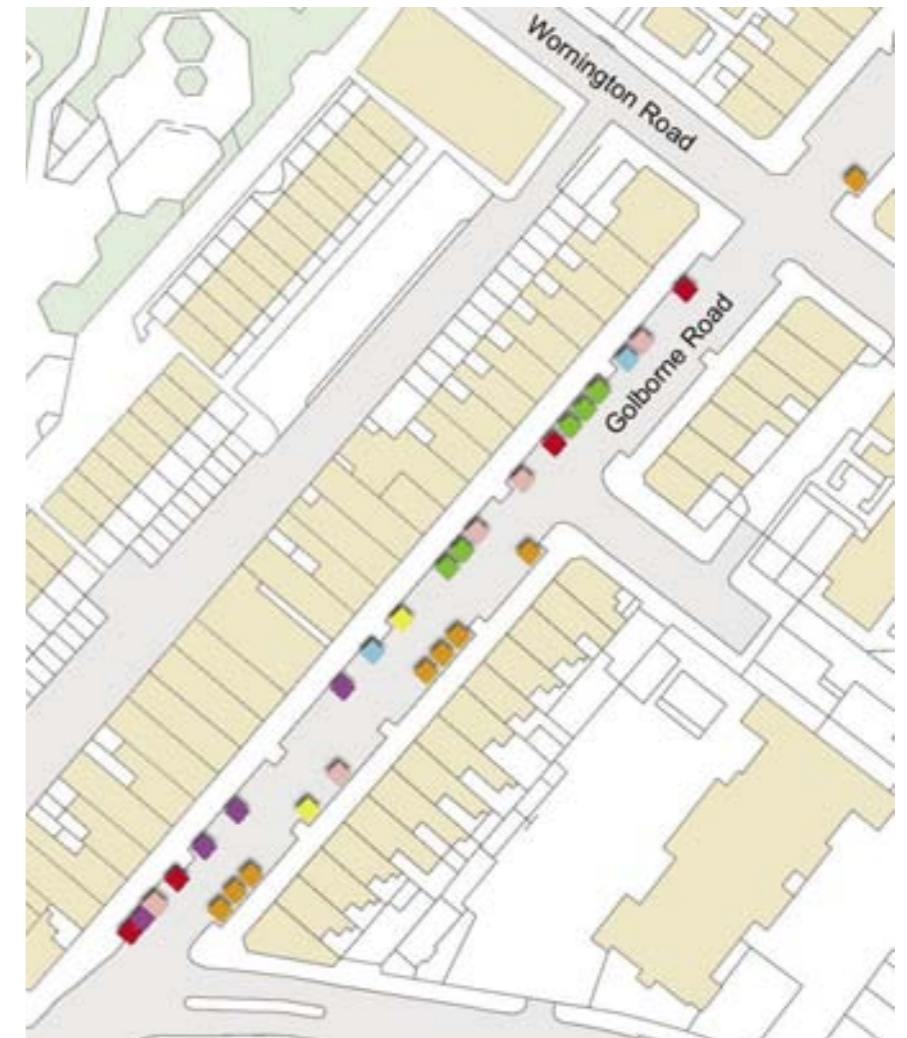
More general food markets such as Borough Market and the revival of Northcote Road in Wandsworth and Broadway Market in Hackney are perhaps the most relevant examples for Golborne Road. In Broadway Market the businesses and residents have come together and agreed with the Council that they can operate a Saturday street market (within the confines of the LLAA 1990), and is one of the most vibrant in London. The critical factor in their success is the hands-on and flexible management. Both Borough Market and Broadway Market have long waiting lists. This can work to the advantage of Golborne Road, for example, the organic baker on Golborne Road came here as he could not get into Borough Market.

In addition to these positive changes, there are supply side factors impacting. Spitalfields Market is still not allowed to operate on Saturdays, while its overall space has been reduced by around 60-100 stalls in the last 8 months due to redevelopment. There is some uncertainty about the future of Bermondsey Antiques Market and in both Portobello Green Market and Spitalfields (run by the same operator) there are concerns that the style of the stall holders is changing, with more imported goods and fewer designer/makers.

All this uncertainty means that now is a good time to plan to increase the market activity, particularly in the areas of food, fashion and lifestyle products. Golborne Road is well placed to take advantage of these patterns, especially as it is surrounded by workspaces occupied by relevant creative businesses and close to the overcrowded Portobello Road.

Generally there is a lack of promotion of the market. The market could be managed with expansion and success in mind, which would bring the additional benefit of more customers to the shops.

There are some small direction signs to Golborne Road near Oxford Gardens (and throughout Portobello Road) erected as part of the City Challenge initiative of the late 1990s. They are not eye-catching nor illuminated.



Current Pattern of Trading

Antiques / Second Hand	Furniture	Fruit & Veg
Fish	General	Delicatessen
Hot Food		



4.4 Physical Analysis

To prepare a comprehensive strategy for improvement of Golborne Road, it is important to gain a thorough understanding of the physical environment as well as the commercial context. This section addresses:

1. Land Uses
2. Character Areas
3. Historic Environment
4. Legibility
5. Quality of Edge and Space
6. Access, Movement and Parking
7. Public Realm
8. Streetscape, Typical Weaknesses
9. Streetscape, Assets and Qualities

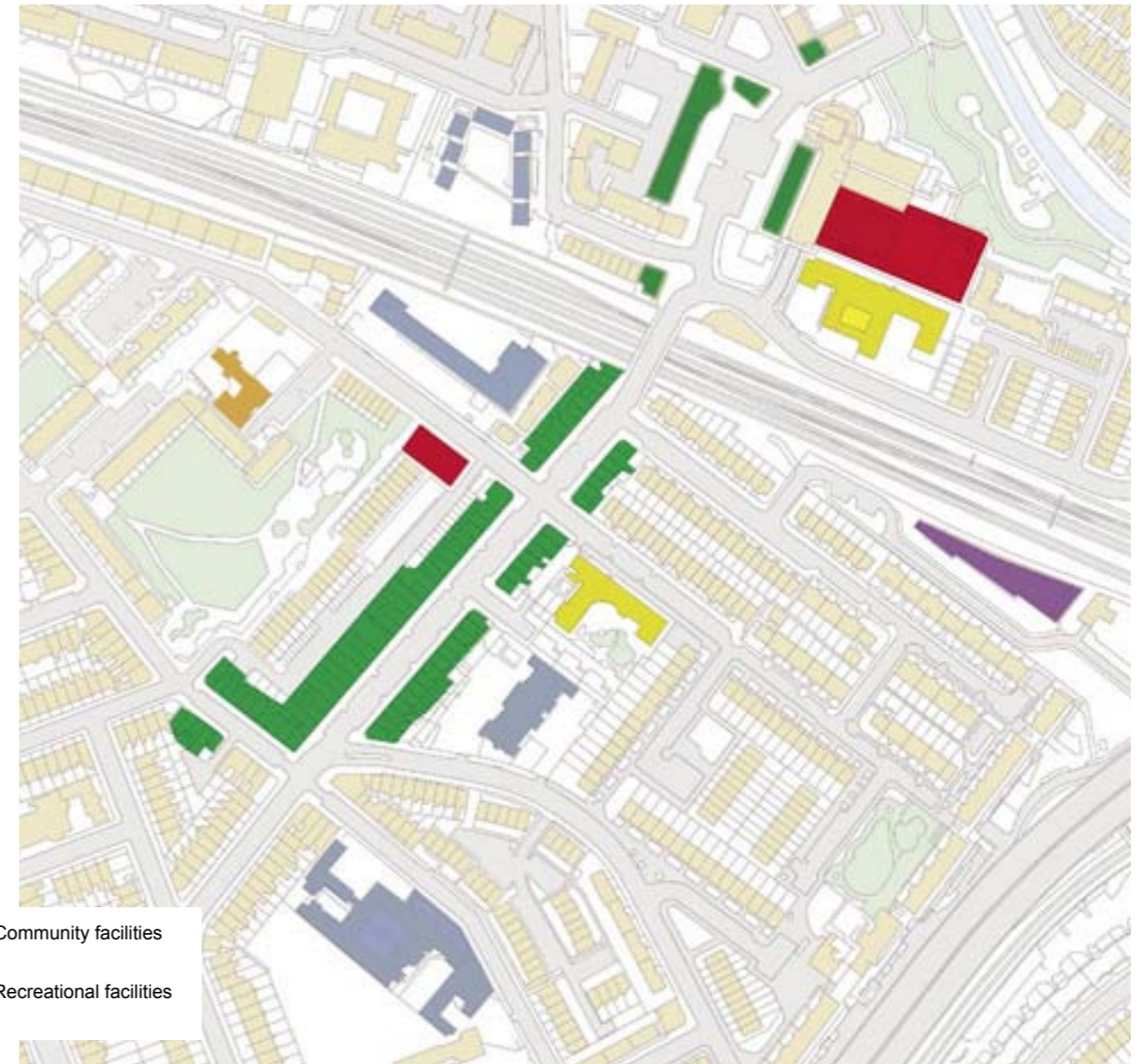
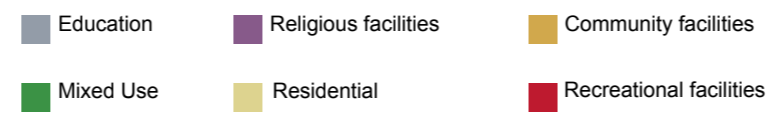
4.4.1 Land Uses

The land uses contained within an urban environment are key to its character.

The land uses in and around Golborne Road are remarkable in their diversity. The road is an active and vibrant environment with retail and restaurants at ground floor level and residential uses above. This combined with the market ensures that the street is lively during daytime hours.

The wider area around the street is dominated by residential uses of which the vast majority are estates such as the Wornington Green estate to the north.

The area also incorporates a number of schools and further education colleges, community facilities such as the Venture Centre, doctors surgery, facilities for the elderly and recreational spaces including Athlone Gardens and Meanwhile Gardens.



Golborne Road is a mixed use environment with retail at ground floor level, residential above and considerable use of the pavement



Golborne Road is set within a largely residential area



The surrounding area includes a number of schools and further education colleges

4.4.2 Character Areas

Urban environments can be separated into different character areas depending on the uses they contain, the architectural quality of the buildings and the general urban form.

The urban environment that surrounds Golborne Road can be divided into 5 different character areas.

1) Golborne Road

Golborne Road has a unique character that is distinct from anything that surrounds it. It is predominantly a shopping street that caters for local needs rather than wider London or tourists as is the case with nearby



- Golborne Road
- Residential Area
- Transitional Areas
- Golborne Square
- Meanwhile Gardens
- Portobello Market

Portobello Road. The street is bounded by three storey Victorian terraces and accommodates a wider road than those surrounding it. It is also clearly connected to the Spanish, Portuguese and Moroccan communities that it serves which is partly evident through the items for sale and in the sense of community that pervades. In addition to this, the street accommodates

the market which while not unique in the area is distinctly different to that along Portobello Road. The environment of the road is also significantly different to the more modern housing estates that surround it.

2) Golborne Square (in front of Trelick Tower)

Golborne Square is a much quieter space than Golborne Road and is enclosed by more modern social housing estates that provide a different sense of character. A number of retail units are incorporated at ground floor level that do provide a minimal level of activity but are not sufficient magnets to make the square a vibrant and interesting location. A number of community uses such as a library and doctors surgery are also located in this area

3) Residential Area

The areas surrounding Golborne Road are dominated by residential development. This includes a wide variety of both social and private housing. The social housing is located to the north and west of Golborne Road while to the south and east more expensive housing is evident. These residential environments are interspersed with other uses such as community facilities, schools and homes for the elderly.

4) Meanwhile Gardens

Meanwhile Gardens is located to the north east of Golborne Square and represents an important open space within the local urban environment. The gardens are independently managed and a sense of ownership and care is evident. The gardens not only provide relief from the surrounding urban environment but also represent a key pedestrian link to the Regents Canal which connects to Paddington Basin.

5) Transitional Areas

The end of Portobello Road and the bridge that crosses the Great Western Railway line are transitional spaces that link key areas together. The northern end of Portobello Road links the main section of Portobello market with the western end of Golborne Road. It varies dramatically in character depending on the day. On Saturday it is full with market stalls but for the rest of the week it becomes an inactive street that accommodates car parking. The bridge connects Golborne Road with Golborne Square. Its poor visual condition fails to realise its importance as an inviting threshold.



Golborne Road



Golborne Square



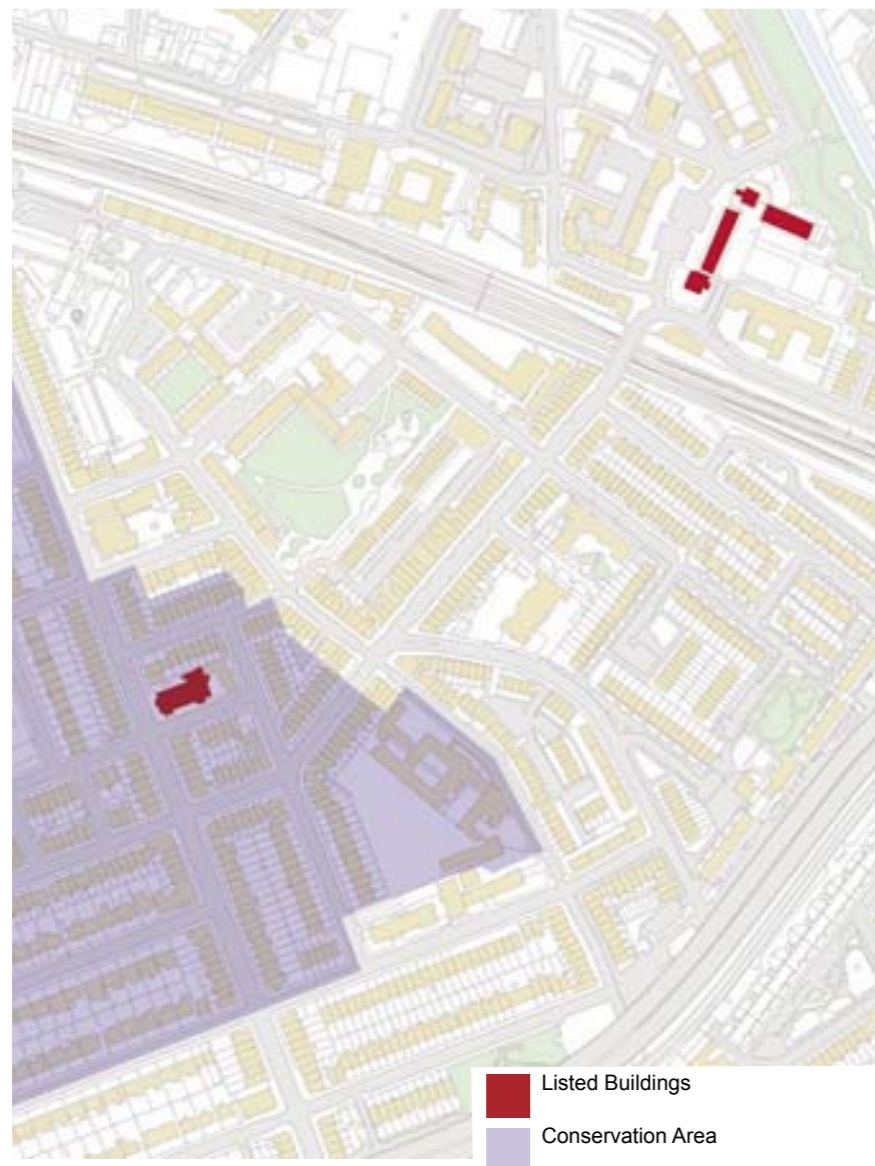
Meanwhile Gardens

4.4.3 Historic Environment

The historic environment around Golborne Road is characterised by a number of listed buildings and a conservation area. A building of note is St Michael's Church which is listed and is encompassed within the Oxford Gardens Conservation Area.

4.4.4 Legibility

The legibility of the urban environment is the ability with which people are able to navigate themselves. Legibility is improved by landmark features such as buildings or monuments that are unique and memorable and help orientation.



A major landmark in the local area is Trellick Tower, a Grade II Listed residential tower constructed in 1973 that rises over 90m in height. It can be seen from many different locations, including the Westway and Great Western Railway which increases its exposure to both motorists and railway travellers.

Within Golborne Road there are a number of local attractions that are well known to locals as well as visitors. These include Stella McCartney's new fashion studios, Lisboa Delicatessen and Coffee Shop, O'Porto Café, the Golborne Fisheries and the Rellik vintage fashion shop in Golborne Square.

The gateways are a key ingredient in establishing a specific identity for an urban environment. The gateways for Golborne Road are located at the junction with Portobello Road and to the north of the bridge. These could be reinforced to create a greater sense of place and arrival for visitors and residents.



The Trellick Tower is a well known listed building in the area



St Michael's Church, consecrated in 1871
Source: (Jerome Borkwood) Tales of the Inner City

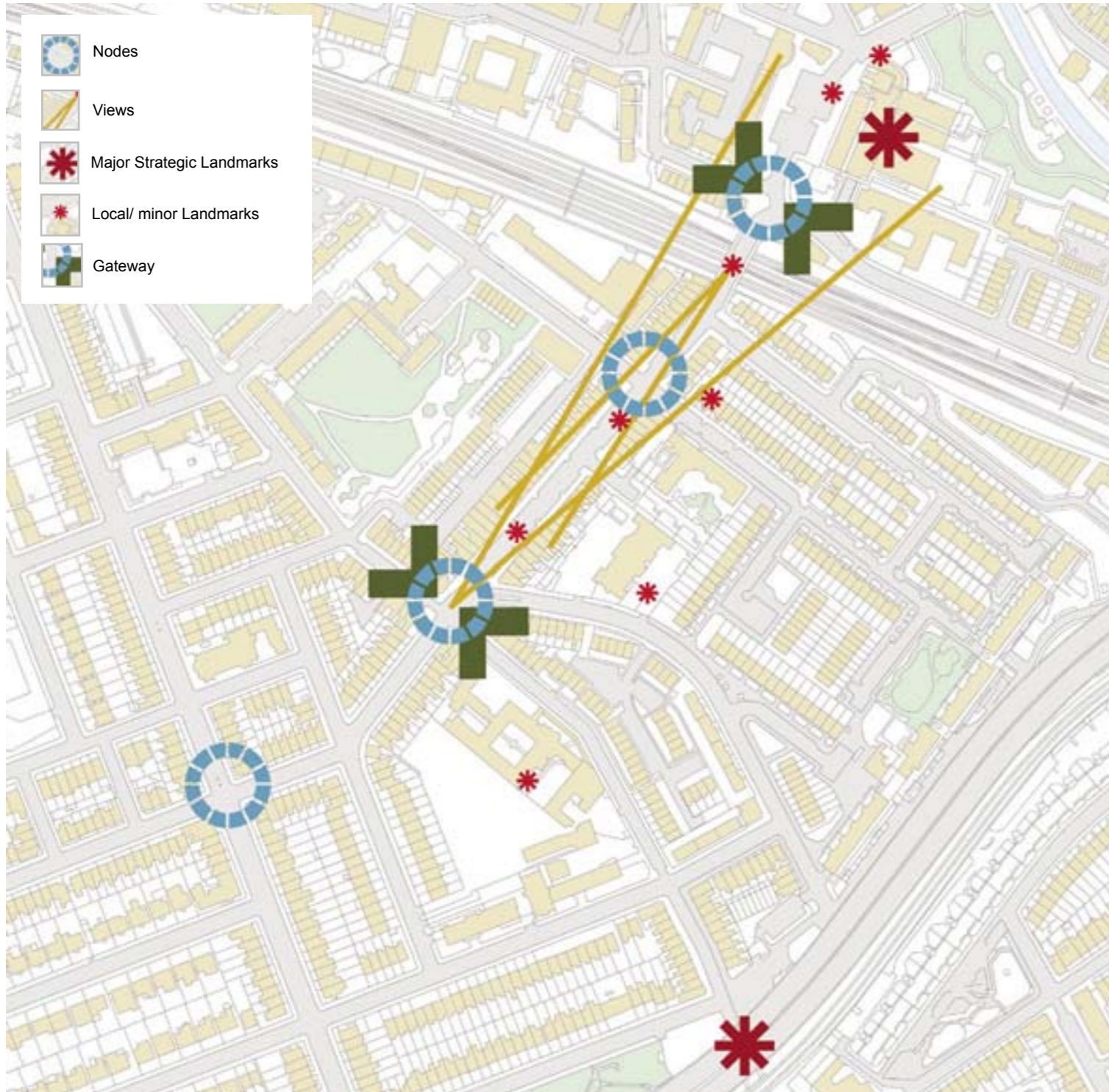


St Michael's Church



Oxford Gardens Conservation Area

Signage is also a key requirement in allowing people to orientate themselves within an urban environment. Currently, signs focus on Portobello Market and both steer people towards the market as well as allowing them to understand their location when they are within the market. Signage for the Golborne Road market is nonexistent to the extent that when people arrive at the intersection between Portobello Road and Golborne Road they are unsure where they are in relation to public transport as well as being unsure which route they are going to take next.



Trellick Tower is a key landmark in the local area and the wider urban environment



Local attractions - O'Porto Café



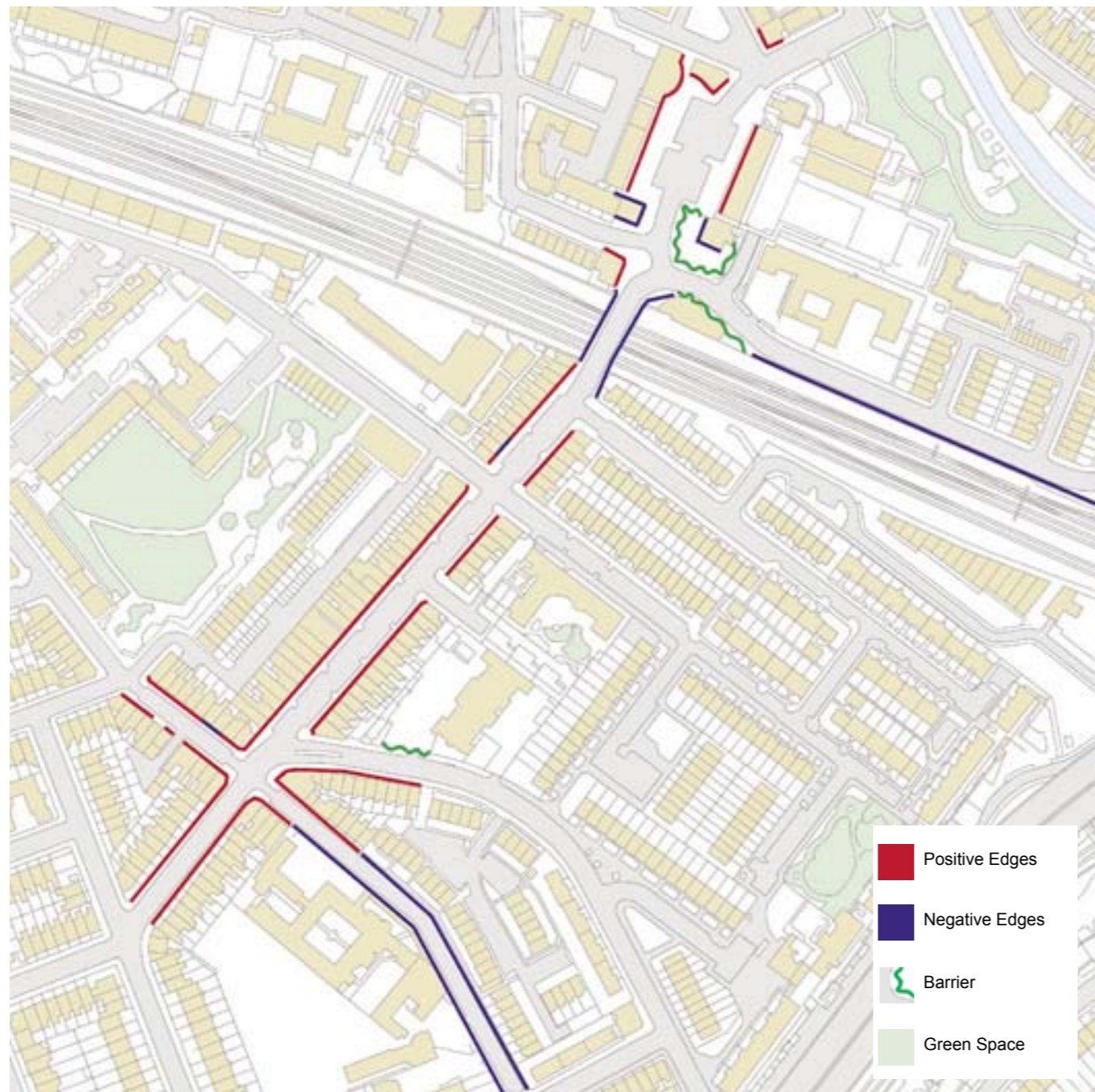
Golborne Road is signed from Portobello Market but the message is lost within the overall list

4.4.5 Quality of spaces and enclosing elements

Enclosure or 'edges' are identified as positive or negative depending on their character. A positive edge is normally well defined by a building and active at ground floor level. A negative edge creates no enclosure and/or has an inactive building facade that has a poor relationship with surrounding public space.

The majority of buildings that enclose Golborne Road have active uses at ground level and therefore can be considered to be positive edges. The elements that are not positive result from shop vacancies or larger shops using a number of adjacent retail units for the storage of goods.

Other poor edges include the bridge that crosses the Great Western Railway line, the south side of Elkstone Road that runs adjacent to the railway line and the northern section of Portobello Road near the Spanish school. All of these areas suffer from a lack of active uses at ground level as well as limited natural surveillance from surrounding residential properties.



A dull brick wall creates a negative edge near the Spanish school



Positive edges along Golborne Road - enlivened with retail activity



The bridge presents negatives edges to the street environment, though it is an excellent structure

4.4.6 Access, movement, parking and traffic flows

Access, movement and parking are key issues to the success of any urban area.

General

Golborne Road is a wide road, in comparison to Portobello Road and other surrounding streets. This allows two way movement of vehicles. Vehicles can move along the street at considerable speed especially when the street is less busy or the market uses are not present.

Public Transport

The wider area around Golborne Road is served well by public transport with Underground Stations at both Ladbroke Grove and Westbourne Park and a wide range of bus routes passing along the main arterial routes. Despite this, no actual bus service is provided along Golborne Road itself which has can be problematic for those that are disabled or elderly. The closest bus stop to Golborne Road is located next to the entrance to Trelick Tower in Golborne Square.

Parking

Parking is a critical issue that needs to be addressed to ensure the future success of the street. The immediate environs around Golborne Road are, subject to a variety of different parking designations (see diagram). Along Golborne Road itself there are parking bays which are relatively low cost pay and display compared with the rest of central London. These bays are regularly used by shoppers and for the parking of market traders vans. The parking bays, however, have a dual use and are rented out by the Council as market pitches on everyday other than Thursday afternoons and Sundays. As a consequence of this, a considerable amount of confusion can be created when people legitimately park along the street and a trader arrives to find a car in the pitch that they have legitimately rented. It should be noted that as a consequence of low demand for market pitches along Golborne Road the number of car parking spaces available varies depending on the day. On days where the market is more active such as Friday and Saturday there are only a limited number of spaces but all other days most of the bays are available.

Illegal parking is a common occurrence along Golborne Road, either through not paying for the 'Pay and display' or double parking along the street which due to its width still allows other vehicles to move along the street. Traffic wardens are often seen in the area but enforcement of parking restrictions is erratic.

Visual Implications

As a consequence of the market uses and inadequate management along the street, there is a high level of vans that are regularly parked in the area. This has visual implications in terms of the general amenity of the street but also creates a visual obstruction of many of the shop fronts which limits the ability of retailers to draw people into their premises and thereby affects their viability as a business.

Congestion Charge

A western extension of the Congestion Charge is now proposed by the Greater London Authority. Golborne Road falls within the new boundary of the congestion charge zone and as such there is considerable concern from the local community as to how this charge will affect commercial businesses and the market. This is particularly the case as it is generally recognised that a large number of those that shop in the street are from areas outside the Zone and as such will refrain from shopping in the street when the charge is in place.



Parked vans along Golborne Road



Parking restrictions around Golborne Road Source: Royal Borough of Kensington and Chelsea

Traffic Flow

Traffic flows along Golborne Road are an important consideration in relation to the future regeneration of Golborne Road. Figures obtained from the Transport Department of the RBKC provide an interesting picture of the situation as it exists.

On a weekday (Wednesday) during a 24 hour period a total flow of 7228 vehicles was counted along the road with an average speed of 25 mph. At the weekend (Saturday) during a 24 hour period a total flow of 4692 vehicles were counted with an average speed of 20 mph. This relationship leads to the conclusion that the operations of the market on Saturday reduces both the number of cars moving along the street, while those that still use the street travel at a reduced speed.

The table below provides a more detailed breakdown of the traffic flow data.

	Weekday (Wednesday)	Weekend (Saturday)
Total Flow	7288 vehicles (Average Speed: 25 mph)	4692 vehicles (Average Speed: 20 mph)
AM Peak	431 vehicles (Average Speed: 28 mph)	281 vehicles (Average Speed: 17 mph)
PM Peak	484 vehicles (Average Speed: 25 mph)	210 vehicles (Average Speed: 22 mph)

Leading on from this conclusion it is possible to foresee that if the market along Golborne Road was enhanced there would be a natural reduction of the traffic flow hence removing the need for any traffic calming measures.

Pedestrian flow survey & retail health check

Intelligent Space was commissioned in September 2005 by RBKC to undertake an analysis of pedestrian movement in and around Golborne Road. This involved measuring pedestrian flows to gain an understanding of how people use the area. From the information gained from the pedestrian flows a retail healthcheck was also produced which compares the movement economy of Golborne Road to other similar streets in London and by doing so can estimate the viability of different types of retail use.

The main findings of the report identify that pedestrian flows along Golborne Road on a weekday (Wednesday) were 601 people per hour in comparison with 1,048 at the weekend (Saturday). The significantly higher flows were attributed to the fact that Saturday is a main market day for Golborne Road and the nearby Portobello Road from which Golborne Road gains a significant level of its pedestrian flow.

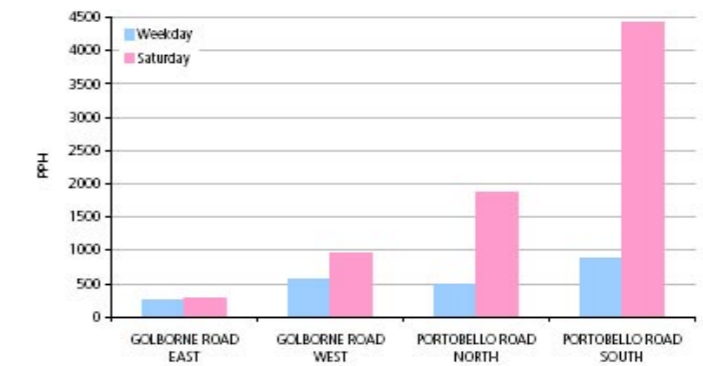
Conclusion

IS found that during the week, Golborne Road is principally used by the local community coming in from the surrounding residential streets. At the week-end the main source of flow is from Portobello Market.

From pedestrian flow figures it is possible to estimate the type of retail that the street can support by comparing the flows with other streets around London. The weekday flows would typically support betting shops, charity shops, video outlets, independent cafes and fast food outlets, but at the lower end of the scale of viability. This implies that the shops that currently operate along the street are highly dependent on the increased pedestrian activity associated with the market on Saturday.

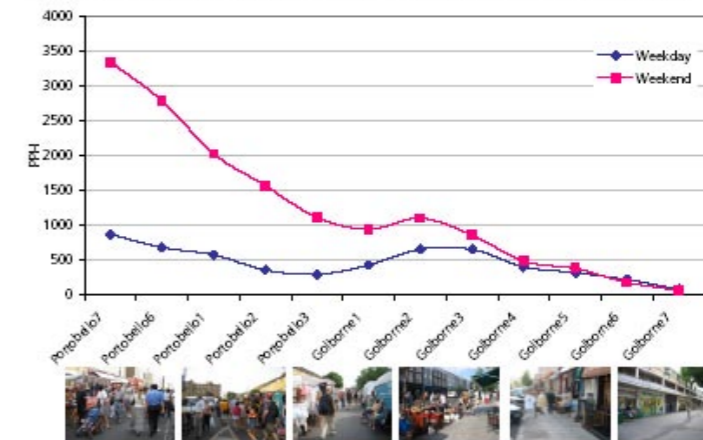
The key recommendations and findings from the report are that the market along Golborne Road, which increases pedestrian flows, is critical in ensuring the economic viability of the shops along the street and its removal would have a negative impact. Additionally, special mention is given to the link between Portobello Market and Golborne Road which, when active, helps to pull people up to Golborne Road increasing pedestrian flow but when inactive represents a barrier because of the blank walls on either side of the street. As such this link is seen as critical to the viability of Golborne Road and should be retained and enhanced. (See Appendix 5 for Executive Summary of the Report)

FIGURE 7. WEEKDAY AND SATURDAY AVERAGE PEDESTRIAN FLOWS IN DIFFERENT SEGMENTS OF THE STUDY AREA



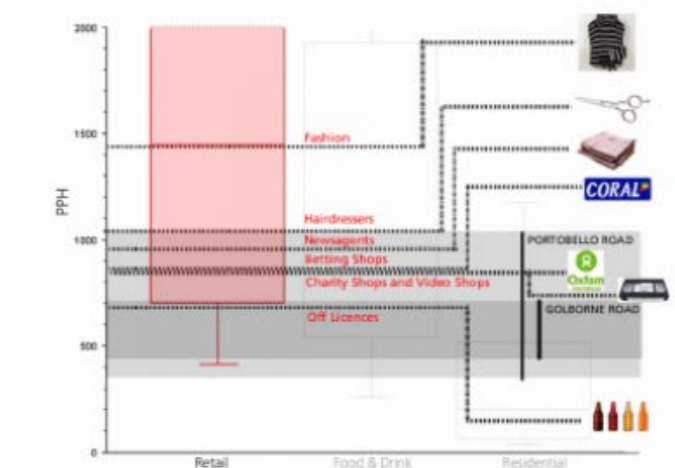
A comparison of weekday and Saturday pedestrian flows in the local area Source: intelligent space

FIGURE 10. DECLINE IN PEDESTRIAN FLOW LEVELS WITH INCREASING DISTANCE FROM PORTOBELLO ROAD MARKET



The decline in pedestrian flows with increasing distance from Portobello Road Market Source: intelligent space

FIGURE 22. BOXPLOT OF AVERAGE PEDESTRIAN FLOWS ADJACENT TO DIFFERENT RETAIL TYPES WITH LOWER SCALE OF FLOWS



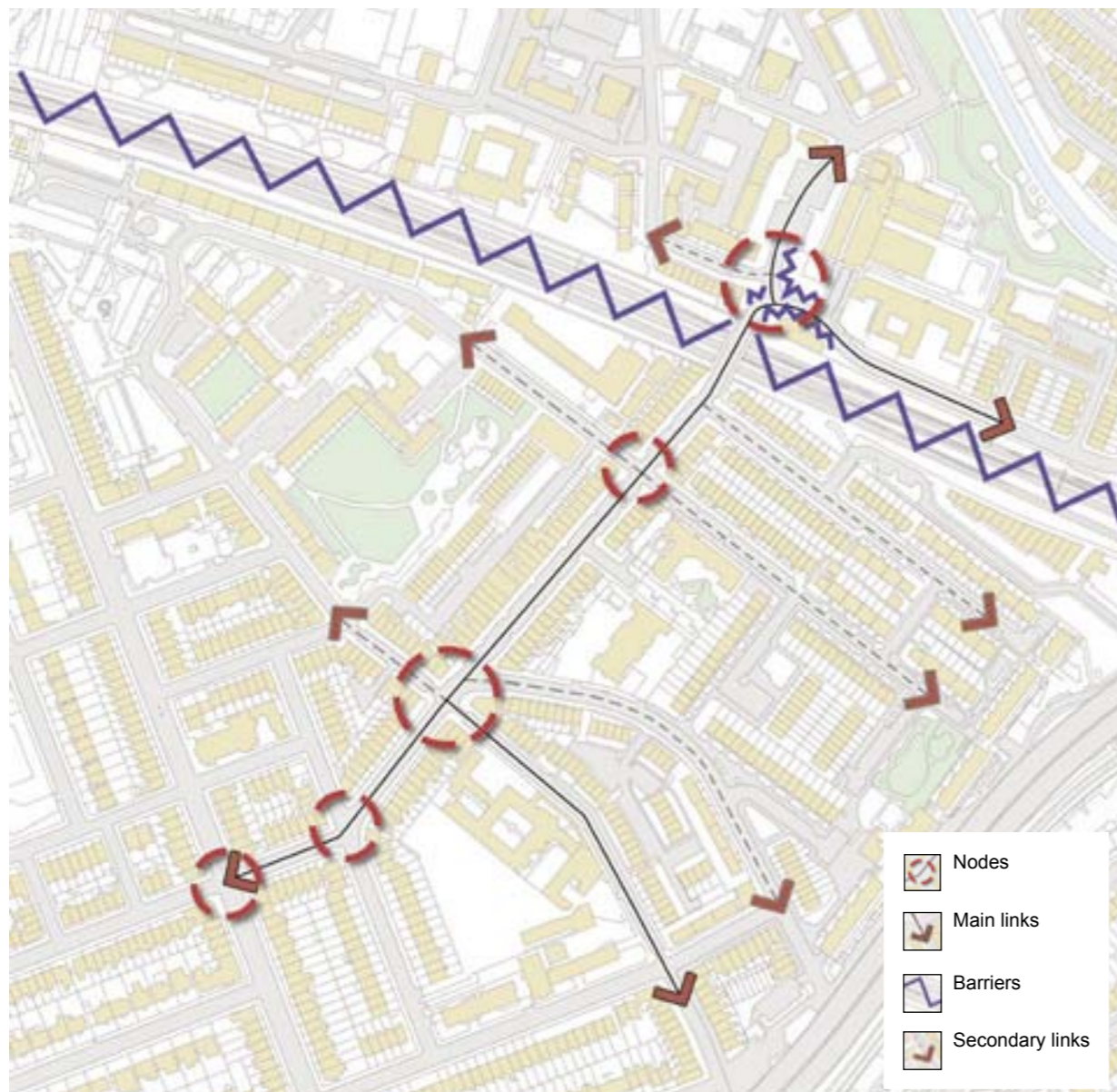
Boxplot of average pedestrian flows adjacent to different retail types Source: Intelligent Space

Movement

Historically, Golborne Road and its environs was an area that had a very permeable street pattern. This has changed over the recent past with the introduction of new housing estates that limit movement or provide routes that are unattractive or seem dangerous.

The main barriers within the local environment are the railway line and Westway which need to be negotiated for any movement to the north, east or south.

More locally to Golborne Road itself, are a number of movement nodes which allow a choice of route. The main nodes are the point at which Portobello Road and Golborne Road intersect and the junction to the north of the bridge which leads to Golborne Square. These nodes are key as they allow access to high pedestrian attractors such as Portobello market. A number of secondary nodes are also located along the street and these provide access to the surrounding residential areas.



Movement around Golborne Road



Residential parking at Golborne Square



Van parking along Golborne Road

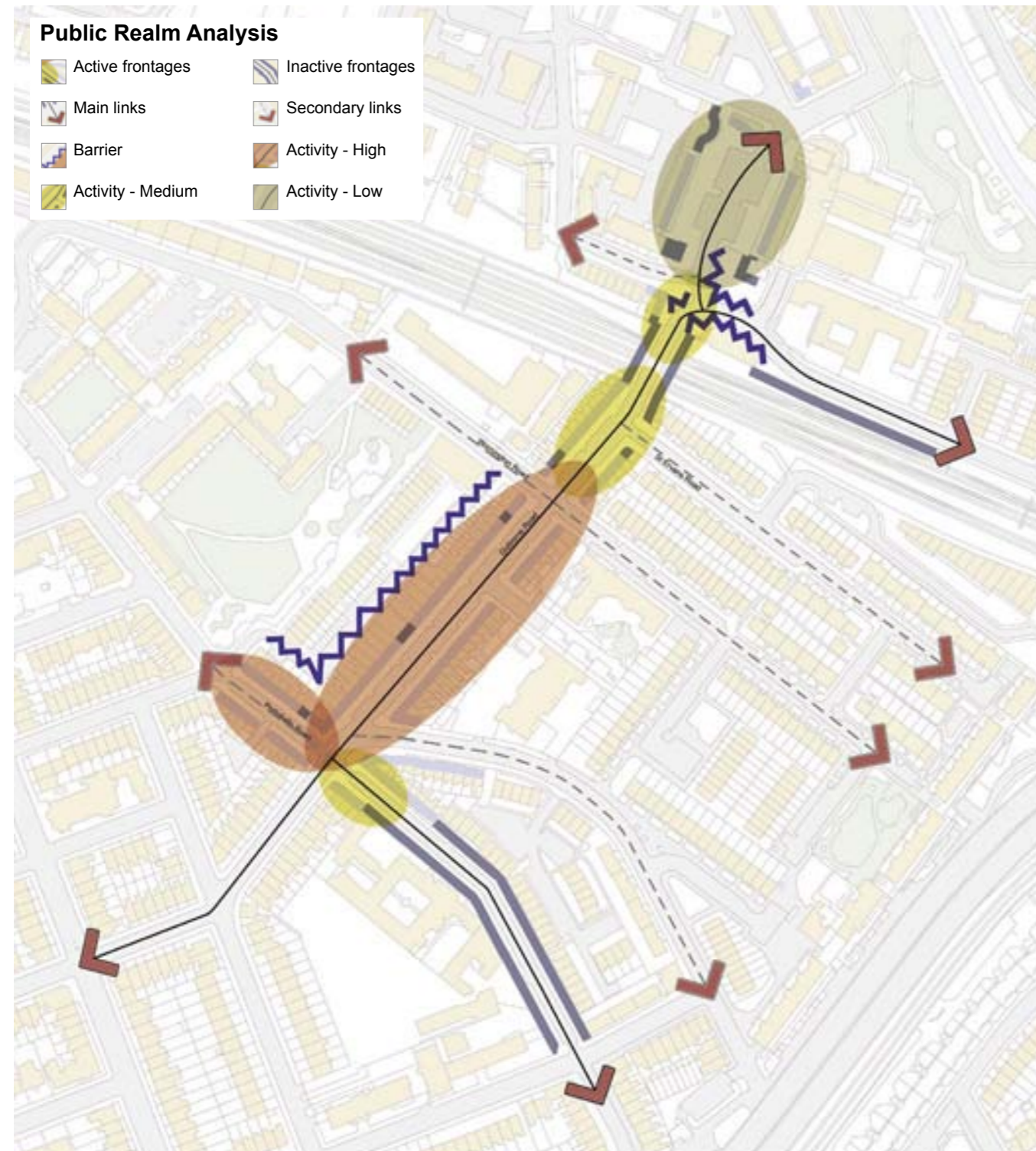


Pedestrian movement and example of conflict between cycle parking and café's outdoor areas.

4.4.7 Public Realm

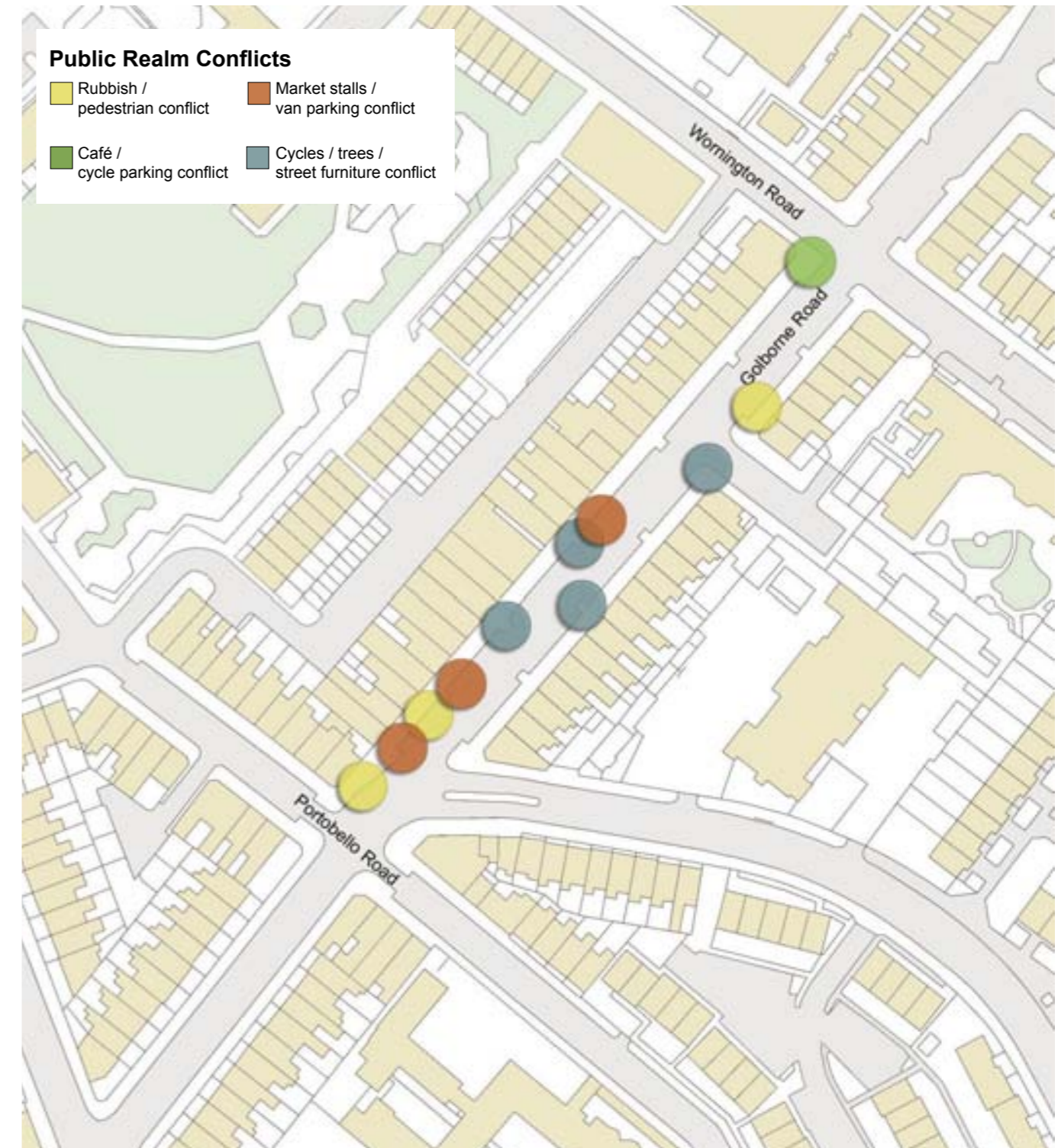
Public Realm Analysis

The public realm is a critical element to the success of a street. At present there are differing levels of activity along the street ranging from high to low. The areas that currently lack activity need to be replanned to attract more people.



Public Realm Conflicts

As a busy and complex street, Golborne Road suffers from a number of conflicts within the public realm. These conflicts detract from the quality of the street and need to be resolved to ensure that the street is used in the most efficient and effective way possible.



Quality of the Public Realm

Golborne Road has been the subject of an earlier enhancement strategy. This changed the nature of the existing carriageway allowing the introduction of defined areas for market stalls and parking.

Generally the palette of paving materials comprises an asphalt surface to the carriageway, stone kerbs, block paved zones to the market stall/car areas and concrete slabs to the footpaths. The materials vary in quality and an untidy concrete edge provides the demarcation between the public footway and the demise of the shop frontages.

Street furnishings are traditionally styled Bollards define the edge of the carriageway and in the location of market stalls these have been designed to act as electricity supply pillars. Many of these are now showing signs of wear. Recently established street trees have metal guards that are frequently utilised to store cycles against. There are no small scale waste bins though larger wheeled versions used for market purposes are evident throughout the week, frequently located in ad-hoc positions. Despite the intense regime of street cleaning, rubbish can still be seen within the street on market days.

Street lighting is provided in a utilitarian manner through highway standard columns. These provide a general 'wash' across the public realm and take little account of the specific requirements of the highway, pavement, shop front or unique façade.

Street trees are few in number and whilst establishing have yet to achieve a stature in scale with the enclosing buildings.



Cycles, bollards and waste materials (on market day)



Concrete slabs and a crude concrete edge to shop frontages



Ad-hoc cycle parking



An extensive asphalt carriageway



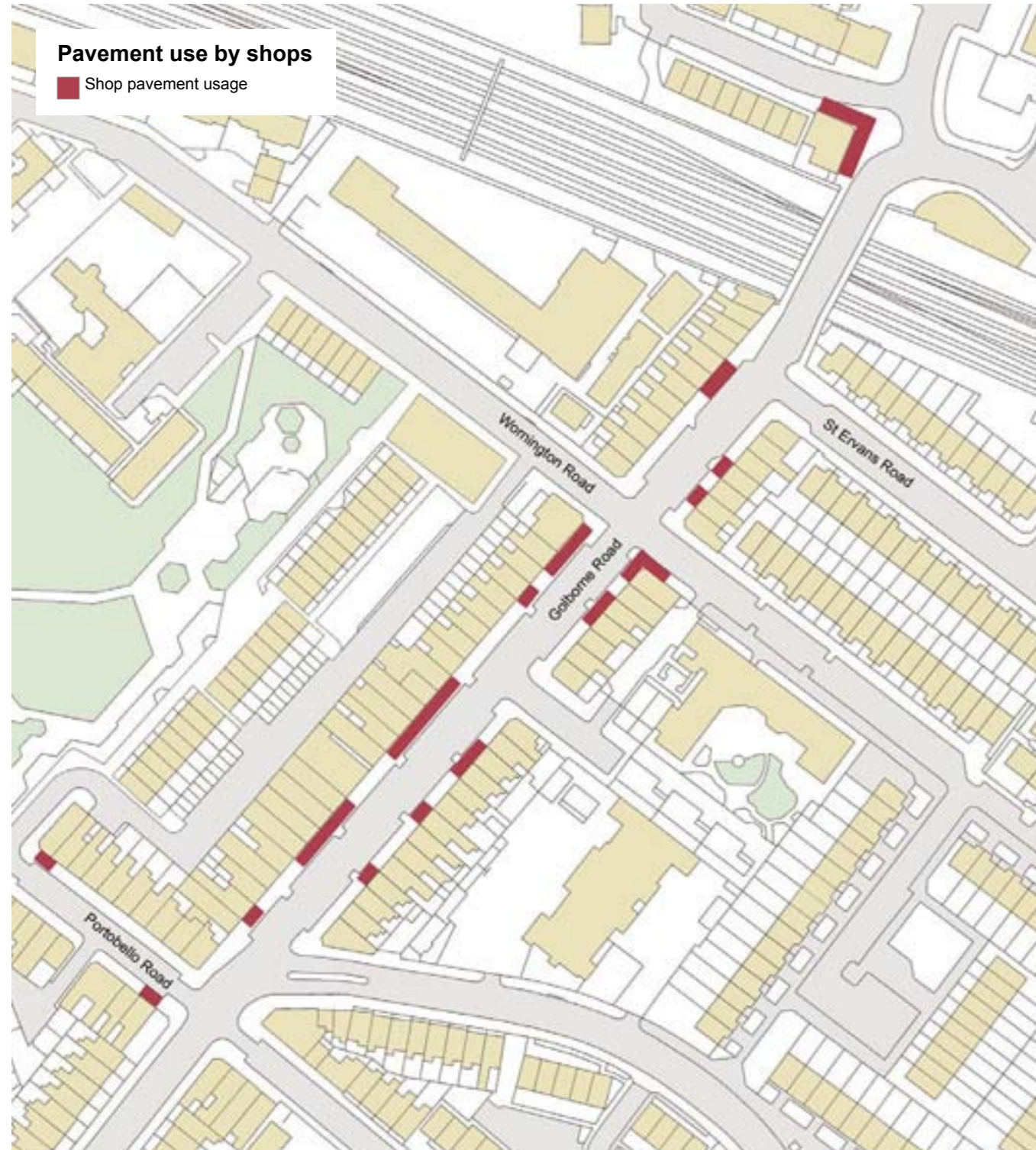
Dull block paving



Wheeled waste bins on the move

Pavement Use by Shops

The shops along Golborne Road are allowed to use their forecourt as an area for selling goods or setting out tables and chairs. This pattern of use is an important characteristic of Golborne Road, though whilst adding interest it could be viewed as adding further clutter. Outdoor space does not appear to be controlled by any external markings such as boundary 'studs' and there is no policy with regards to the nature of fittings and furniture used.



Shop Frontages

Whilst they vary in their state of repair, shop fronts are generally characterful. Some traders retain awnings that further contribute to the character of the street scene. Grants for their enhancement would help to create a fresher, more unified appearance though this work may not add significantly to the economic viability of the trading unit.



4.4.8 Streetscape - Typical Weaknesses



North side of the street



Inactive, badly maintained frontages



Attractive facades many requiring attention



Shop units used only for storage



Double parking creates visual/physical intrusion



Under-used spaces beneath and alongside buildings



Lack of provision for cycle parking



Poor public/private interface



Rubbish and ugly waste containers



Presence of vans in market area creates conflict of use



Patch pavement materials



South side of the street

4.4.9 Streetscape - Assets and Qualities



North side of the street



Variety and choice



Textures and smells



History and character



A range of traders



Colourful



A diverse and vibrant local community



Ethnic mix creates a richer environment



Friendly and relaxed



Local community



Outdoor cafés



South side of the street

Issues

The analytical studies highlighted a variety of factors that will shape the nature of the emerging regeneration options. These can be identified as follows:

- Golborne Road is an eclectic and interesting urban environment.
- It has a cosmopolitan feel and is heavily influenced by local Spanish, Portuguese and Moroccan communities.
- Despite lower than average rental levels many local businesses struggle to remain economically viable.
- The market represents an important element of the identity of Golborne Road.
- The market is a major provider of fresh food to the local community.
- The market is a destination for visitors, especially with regard to antiques.
- Whilst the market has 72 pitches, only 35 are used on a regular basis.
- Parking and the enforcement of traffic orders is an issue and source of conflict.
- The community has a strong connection to the street and enjoys the mix of people and retail facilities.
- The market is seen as an integral part of the street and of the local community.
- Whilst being attractive the Road does not have universal appeal and change is required to ensure its future success.
- Whilst comprising a discrete 'island' of activity, Golborne Road extends into a series of secondary spaces that, if improved, would result in a highly successful overall solution.
- Any change will be contentious, but in an area that has been the subject of almost constant change, it should be achievable.
- Celebrate the diversity of past, present and future communities.
- Understand and work with the needs and aspirations of the community.

Exploring the Options

With its generous proportions, attractive enclosure and lively mix of uses, Golborne Road presents the opportunity to create an exciting and inviting public 'Place'.

The findings of the economic analysis and of pedestrian movement indicate that the market has a fundamental role to play in the future life of the road but it is important that a number of alternative approaches are considered that examine the opportunity that arises if trading were to cease or be located elsewhere.

A broad range of options and sub-options quickly became apparent and from the initial studies three distinct approaches were pursued. These considered taking no action that retains the status quo and allows the current course of events to take place unchallenged. The second, and more radical approach was to consider the total removal of market trading activities from the Road, utilising the vacated space for broader footways and 'al-fresco' dining. The third option builds upon the existing situation, retaining the market but bringing in new patterns of trading and new systems of management, all within the context of an attractive public realm.



5. Opportunities for Change

Option A - No Intervention

Option A puts forward the idea of no intervention. This is an important option to consider as whilst no positive action may be made, unplanned change will almost certainly take place.

Initially, the perception of a lively mix of retailing and market trading would continue. However, we consider that the current situation would begin to deteriorate due to the following matters:

Issues

Existing problems with parking and enforcement will persist

Golborne Road currently suffers from a conflict between parking and market uses. Double parking, with vehicles left in the carriageway is prevalent and prevailing restrictions do not appear to be fully enforced. The no intervention option would leave these issues unresolved which will continue to have a negative impact on the character and commercial vitality of the area.

The quality of the street and the market will slowly deteriorate

Over the past few decades the shops and market along Golborne Road have increasingly failed to attract people to the area. The no intervention option is likely to reinforce this trend and lead to the further deterioration of the street and market.

Narrow commercial interests will dictate how and when the shops change resulting in possibly unwelcome change

A number of shop keepers are either nearing the age of retirement or are considering leaving the street due to commercial viability reasons. This trend may have a negative impact on the street as the shops which take their place may not retain the character of the area or serve the local community.

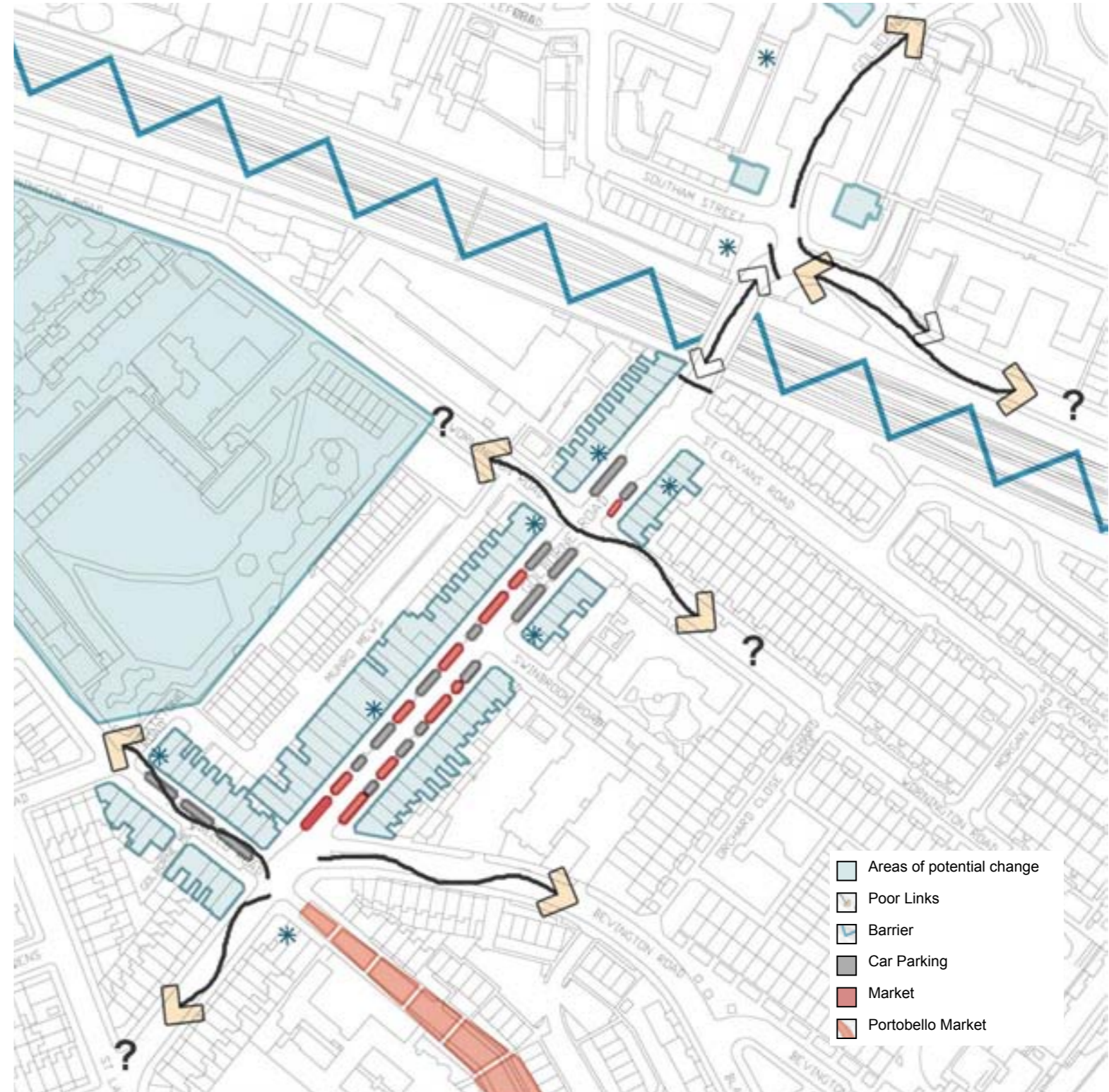
Market Management continues to concentrate on Portobello Road

The market management for Golborne Road is currently considered jointly with Portobello Market. The majority of effort and management initiatives appear to relate to Portobello Market rather than Golborne Road. The no intervention option will further exacerbate this problem and fail to provide Golborne Road with an appropriate level of management.

Action required: No new initiatives, maintain the status quo

Conclusion

Whilst this approach is attractive to those afraid that any change would be detrimental, the option fails to address the fundamental problems affecting the street and market, and could lead to the further deterioration of the area.



Option A involves no intervention

Option B - Cease Market Trading and Enhance the Public Realm

This Option promotes the idea of totally removing market trading and utilising the free space for wider footways and alfresco dining.

Issues

A rejuvenated public realm

The termination of market trading would generate additional pavement space that could be enhanced through the introduction of new surface materials, street furnishings and a significant number of new street trees.

The removal of stalls, canopies and traders' vehicles would give greater visibility to shop frontages, increasing their prominence and potentially their trade. The additional pavement space would also allow cafes and restaurants to trade externally, adding to the creation of a lively street scene.

In addition to the space currently devoted to market trading, it is considered that the relatively low volumes of through traffic would allow the running carriageway to be reduced to 6m. Whilst full pedestrianisation is not envisaged, the concept of a road where pedestrians have priority over vehicles is worthy of consideration and could draw upon concepts currently being considered in the establishment of 'home zones' in residential areas. This approach could be extended to create the idea of a single surface that combines all of the proposed uses.

There would however be negative effects to this approach which can be summarised as follows.

Loss of existing character and street life

Golborne Road is a unique place full of character and street life with the loss of market trading, aspects of this could be lost.

Shops suffer reduced trading

Through the business surveys it became clear that the majority of shop keepers along Golborne Road feel that the market is an important attraction for the street as those that are attracted by the market also make use of the shops. As a result, business is better on stronger market days. The no market option would remove this important component of the street and could have a negative impact on the surrounding shops through reduced trading and an increased level of vacancies. Effectively the extent of the retail offer would be reduced.

Recent research by the New Economic Foundation on behalf of the GLA on the impact of street markets arrived at a similar conclusion ie that shops welcome market activity as it increases footfall.

Contentious

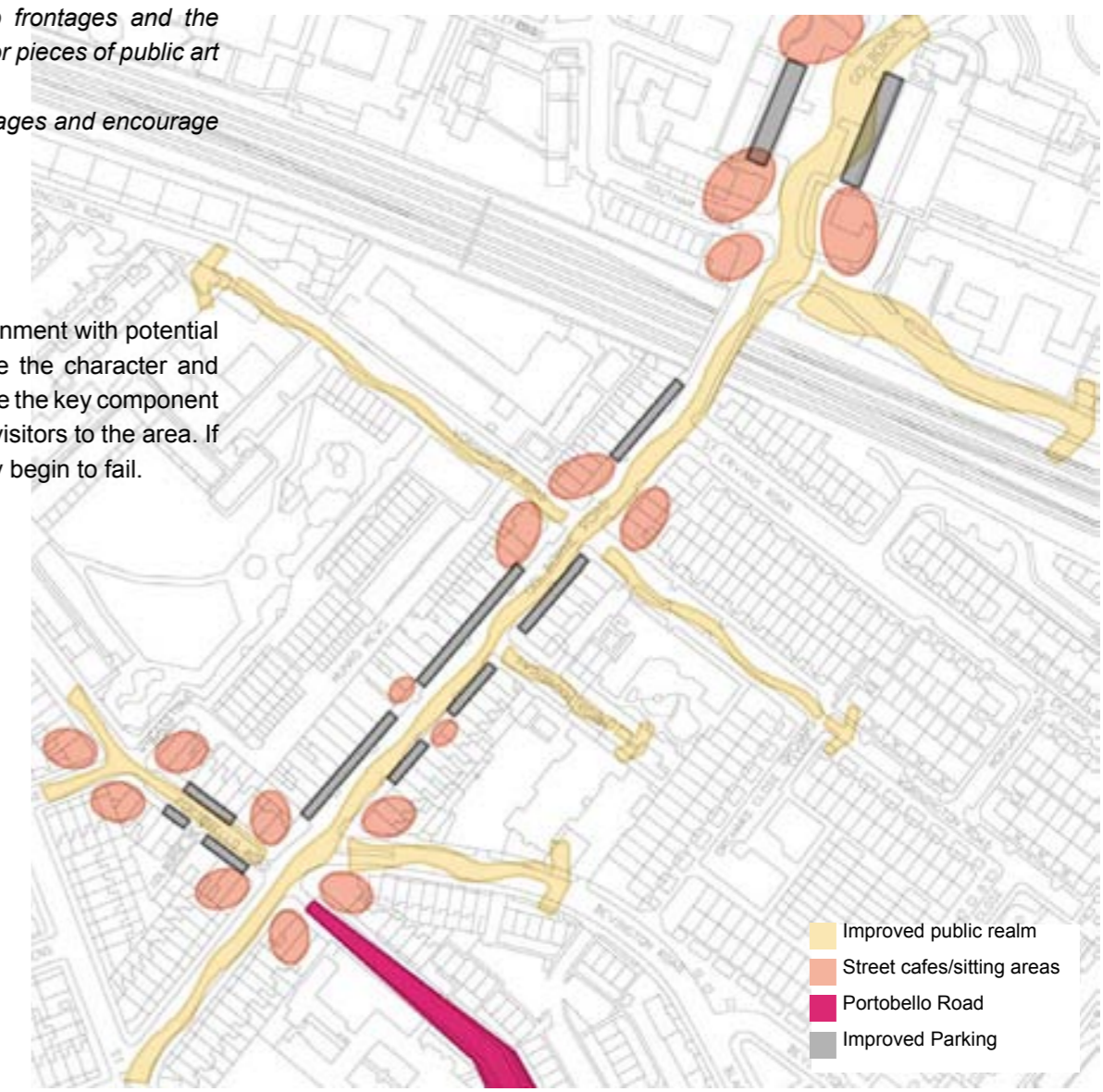
From consultation, the local community would view the removal of the market as a contentious move. The market predominantly serves local residents and as such its removal would be unpopular. There are procedural difficulties associated with the de-designation of the market and the 1990 Street Licensing Act allows for the right of appeal to the Secretary of State by any aggrieved person.

Action required:

- negotiate the removal of stallholders and street trading with a strategy to relocate some stalls to Portobello Road.
- undertake major public realm improvements, with wider pavements, a narrower highway, the enhancement of shop frontages and the establishment of more street trees, introduce major pieces of public art to create focal points.
- work with business owners to improve shop frontages and encourage 'al fresco' activity
- amend letting policy

Conclusion

This option will create a more simplified urban environment with potential for an enhanced public realm. It may however, lose the character and identity of the street as it exists. This is considered to be the key component of its future success and the main attraction to draw visitors to the area. If this is the case some of the established retailers may begin to fail.



Option B involves removing the market altogether and thereby allowing more space for customer parking, loading/unloading and wider pavements, with the retail frontages being more visible

An Enhanced Public Realm - Option B



Option C - Improve the Market and Enhance the Public Realm

This approach would build upon the successful aspects of the street, improving the environment for shops and market traders and create a more attractive public realm for residents and visitors.

Issues

Shops benefit from more activity along the street

It is considered that improving the street and market will have the benefit of attracting more people into the area thereby helping the current shop keepers/market traders to remain economically viable and as such retaining the shops and businesses which are unique to the area.

The character and identity of the street is retained and enhanced

Golborne Road is well known as a street that has retained many of its original characteristics. This option will enhance the character of the street through a number of key initiatives:

- 1) The introduction of public realm improvements that provide a new and more organised platform for the activities in the street.
- 2) An arrangement that addresses and removes the current conflict between uses.
- 3) An improved market with additional traders and enhanced facilities will help to ensure that the street retains its character and continues to serve the local community.

Through these initiatives it is envisaged that the street will build on its existing strengths while removing its weaknesses. These will help the area to become more well known locally and within the wider London area, both important factors which will help ensure economic viability.

Less Publicly Contentious

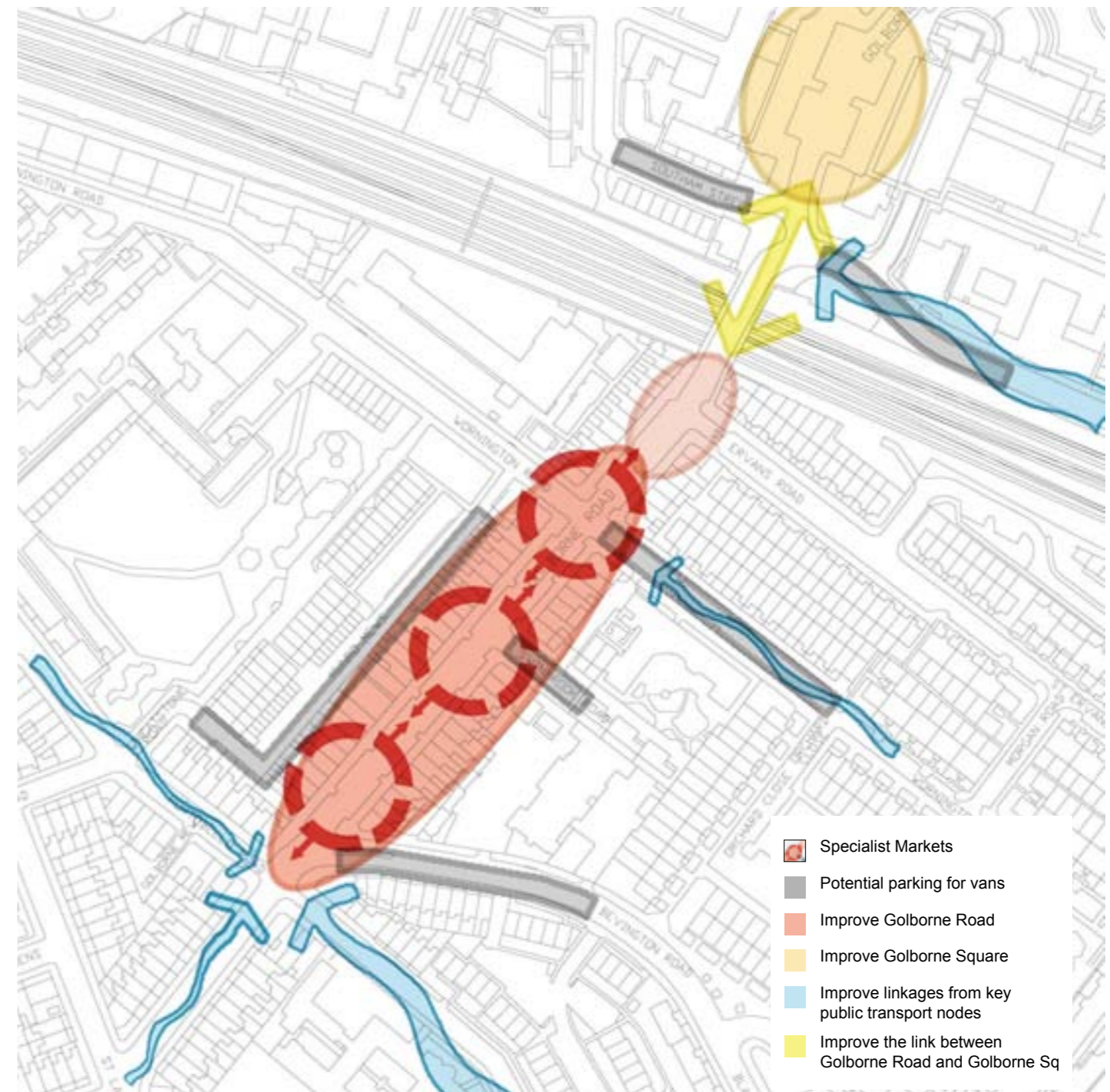
It is critical that the local community supports and adopts the preferred strategy. The approach of improving the street and market will be less publicly contentious, and is more likely to result in a successful solution to the current problems.

Action required:

- Improve streetscape with wider pavements, a narrower highway and the enhancement of shop frontages.
- *Concentrate current market activity into a more compact area.*
- *Promote distinct locations for specialist markets in different areas along the road.*
- *Locate parking for vans in specific areas away from the street*
- *Introduce a local manager and management strategy that specifically deals with Golborne Road and is independent from Portobello Road*

Conclusion

This option retains the important characteristics of the Road and will help to ensure economic viability. It will however require capital investment to enhance the physical environment and ongoing finance to provide a higher level of long term management and maintenance.



Option C involves improving the Street and Market

Full Market Day + Outdoor trading for shops and cafes - Option C



6. Differing Approaches to Market Trading

Whilst market trading in Golborne Road has followed a particular course, significant variations to the pattern of trading are possible. This study has considered a number of potential options that include focused market days when trading is centred on a particular part of the street, alternative rest days, the opportunity for a Sunday market and differing approaches to management and promotion. From our research and preliminary consultations it is evident that there will be resistance to change, whatever form this may take. However, in proposing any solution it will be important to understand and promote the issues of viability and vitality and the manner in which the new work will improve the commercial well being of all parties.

Market Management

There is great potential to develop the market, not only for itself (e.g. in order to fill the current 50% vacancies) but also making the major contribution to the future viability and vitality of Golborne Road. There is great potential for Golborne Road to develop from being the end of the Portobello Road experience to a destination in its own right.

While the existing food and antiques/collectables offer should remain, albeit it in a slightly more organised fashion, we feel that there is a great opportunity to capitalise on some of the growing areas of market activity. There is a considerable amount of creative talent in the area and this could be reflected in a lifestyle market offer. This would be led by working with designer/makers be they in fashion, practical objects, design, jewellery or gifts. While this has been attempted in Portobello Road outside the Markets Office, it is felt that, if managed correctly, Golborne Road would be a much stronger location.

With the decline in stall numbers at Spitalfields and on-going stall holder uncertainty at Portobello Green, now is a good time to make the most of this opportunity. In addition, there is a question on the future of Bermondsey Antiques Market and there is the potential to bring this type of activity to Golborne Road.

While Sunday is considered by the Council and locals as a day of rest, we think that as the impact of the Congestion Zone becomes apparent, Sunday should be considered as a trading day be it for some less intense activity such as a farmers market (or food produce market). This could be located in Golborne Square.

The interest in food could also be promoted on mid-week days. The study discovered that many shoppers come from the immediate area and would utilise additional small, local fresh food markets. This move would be in line with a similar initiative from the GLA that is considering the role of street markets and farmers markets. In a report undertaken on their behalf by NEF entitled 'Trading Places: The Local Economic Impact of

Street Produce and Farmers Markets', they have found that the majority of fixed retailers would welcome the additional trade that markets would bring both for themselves and the area. Retailers even welcomed direct competition from similar traders as long as it was not too close to their own premises.

Market Areas

The philosophy for the market on Golborne Road will entail creating specific market areas for different types of market use on specific days. The new zones will identify areas for market uses and will be located at key gateways and nodes along the street to ensure that the activity of the market is highly visible and helps to encourage customers to move along the street. The number and relationship of these nodes of activity should be flexible allowing change to occur as trade becomes re-established.

Full Market Days

The concept for Full Market Days involves the introduction of a Thursday, Friday and Saturday market which will consist of food (hot and cold), antiques (books, furniture, collectables, and bric-a-brac) and lifestyle (arts & crafts, designer/maker fashion, jewellery and household objects). The change in trading pattern is seen as an incremental process that would be monitored and adjusted over a period of several years.

This approach has been adopted to ensure that people have a clear view of the goods being sold and the stalls have been located, in part, to reflect the uses in the surrounding shops and thereby consolidate the identity of the zones. It is envisaged that the demand for pitches on full market days will be high and therefore no parking will be available along the street during this period. It is recognised that Thursday is currently a half day market but in order to create a certain level of momentum that is carried through to Friday and Saturday, it is considered that this day be changed to allow a full days trading.

Focused Market Days

Focused market days will occur on Tuesday and Wednesday. On these days the market will retain the same market uses but will be organised into core areas with the space that becomes vacant available for car parking. Within these core areas it is envisaged that semi permanent market stalls will be installed which will be used by market traders that trade throughout the week. These could create an interesting and visually attractive addition to the street though to avoid the need for planning permission they should be demountable. Daily removal presents a further maintenance task though this can be accommodated within the context of a more successful operation.

Two types of stall could be introduced. The first could be daily stalls, provided by the Council for traders to rent from them. They would be of a uniform size and erected daily. The advantage of this approach is that the market and street would have a uniform appearance, giving traders with less attractive stock an improved image. The disadvantage is that the Council would need to take a pro-active approach to management and storage. The stalls themselves could be flat packed, transported by hand cart and stored in Munro Mews.

In arriving at the proposed arrangement of stalls we considered a variety of alternatives, including moving trading to the centre of a single side of the street. Potentially this could free footway space for outdoor cafe use, car parking and general pedestrian use. Market stalls currently attract customers to both sides of the street and the shops benefit from the related footfall. Café use of any free space particularly on the sunny side of the street would be attractive but it may be impractical to assume that all such uses could be transferred to that location.

Through this approach it will be clear which spaces are available for use as car parking. As demand grows for trading on the focused market days there will be the possibility to expand the market into the parking areas. The decision as to how to manage any potential future demand should be dealt with by the proposed Golborne Road Street Manager.

It is suggested that the parking that becomes available on focused market days should be priced at a higher level than it is currently to ensure that those that park along the road remain for a shorter period of time and hence more spaces are available for shoppers visiting the street by car. This approach will also avoid traders using the spaces for parking of vans.

Days of Rest

Sunday and Monday have been identified as potential days of rest for Golborne Road. During these days parking will be allowed throughout the street other than in those areas where there could be permanent stalls.

Whilst closure on other days has also been considered, the findings of this study indicate that the market is key to providing economic viability for the shops. Many local people use the market on a daily basis and putting these issues together we believe that it would be prudent to try to maximise market activity throughout the week. While market trading may not be equally active throughout every trading period, our approach suggests timings that allow for peaks and troughs. The approach enables a focused area of trading to operate in a series of distinct locations while freeing up space currently reserved for stalls. Whilst it is clear that Fridays and Saturdays are currently the most successful trading days, experience shows that by taking a flexible approach it is possible to build back market activity during the earlier part of the week.

While the right management approach is vital, the success of new arrangements must be carefully monitored and should real difficulties be encountered decisions can then be made to reduce the number of trading days.

Additional trading will place further pressure on general maintenance of the road and market areas and may also impact on deliveries/removals to other premises. A careful schedule of management tasks and access arrangements should be established at the outset and as with trading activities must be reviewed and adjusted as required.

Sunday Market

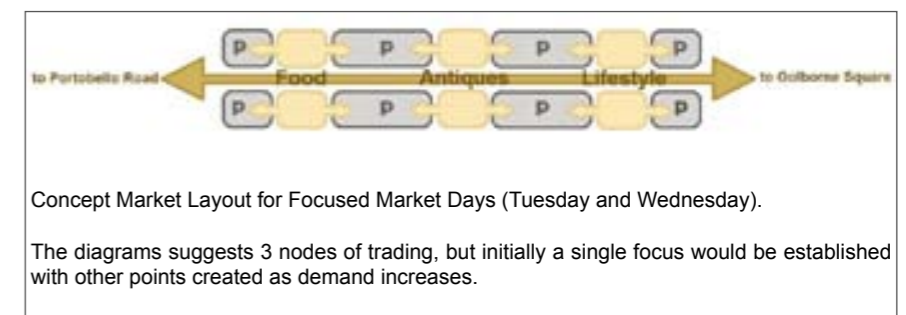
A farmers market selling food is suggested for Golborne Square on Sundays. This will bring life and activity to an area that is otherwise lacking in both. It is proposed that the amenity could be managed by the Golborne Road Street Manager. Such an amenity would be used by the local community but is also considered to be attractive to visitors from a much wider catchment area.

Golborne Road Market Manager

It is suggested that a new position of 'Golborne Road Street Manager' is established to ensure that the market and retail traders along Golborne

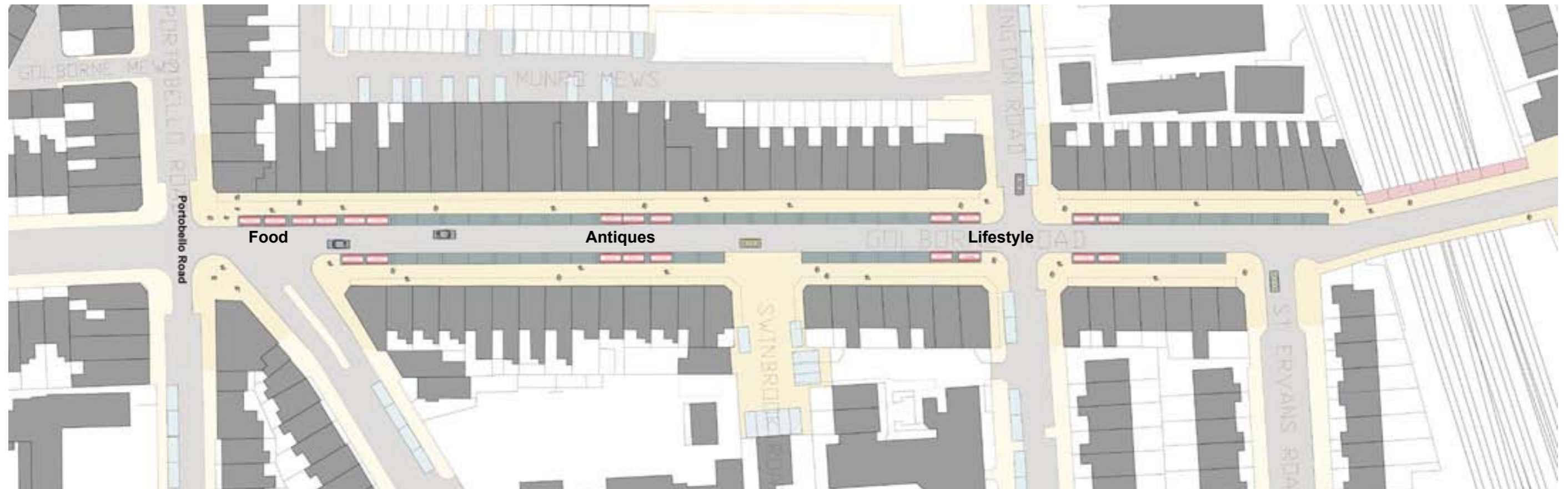
Road receive the attention they deserve. The new Golborne Road Street Manager will be able to concentrate on the issues concerning the street and deal with them more directly and efficiently.

With positive nurturing, this type of market can thrive. It will be vital to the success of this initiative to adopt the correct management style. The approach has to be one where there is an overall manager of market activity on Golborne Road who must be dedicated to the task, flexible, hands on and have an understanding of the needs of small businesses working in this environment. In addition, it will be important for the street manager to liaise in a positive way all organisations that have an interest in the area, drawing together the needs of the owners and operations with the RBKC departments dealing with estates, cleansing, housing, youth, arts and leisure. This change will give the Markets Department a chance to reconfigure its resources so that those currently going into Golborne Road can be used in a more strategic manner. As the funding for this type of market needs to be neutral (income covering costs), we consider that the resources for this might be available from a doubling of the existing levels of activity.



The diagrams suggests 3 nodes of trading, but initially a single focus would be established with other points created as demand increases.

MON	TUE	WED	THUR	FRI	SAT	SUN
Day of Rest	Focused Market	Focused Market	Full Market	Full Market	Full Market	Day of Rest for Golborne Road ----- Farmers Market in Golborne Square



General Arrangement for Golborne Road

- Wider pavements
- Multi-use areas
- Narrower carriageway
- Permanent Stalls
- Stalls on the Bridge

The role of the street manager is more akin to that of a town centre manager but with more of a market focus. Liaison with shops and owners will be vital in order to direct the street to a more positive trading future. The overriding objective will be to run 'Golborne Road' as a business for customers with change being seen as a positive move and not something to generate conflict.

Design Issues

While management issues are clearly critical in ensuring the future success of Golborne Road and the associated market, it is important that the street is designed to allow all the activities within it to flourish and be well organised. This section therefore considers the type of design intervention that is necessary to ensure the success of the preferred option.

Wider pavements and narrower carriageway

The pavements along Golborne Road are not sufficiently wide to comfortably accommodate outside trading from shops, pedestrian flow and market trading. It is therefore proposed that at the expense of the very wide carriageway, the pavements are widened to allow all these uses to work more efficiently and provide improved amenity for the pedestrian. The reduction in width of the carriageway will also be beneficial as it will reduce the speed of vehicles and reduce the ability to double park.

Multi-use areas

Multi-use areas will be introduced along the street which will accommodate both parking and market stalls. These areas will lie 'flush' with the adjacent pavement but will be differentiated through surface materials. These areas will need to be carefully managed and parking arrangements enforced to ensure that they are used appropriately.

Mixing uses in a flexible manner Introduce demountable multi-purpose structures



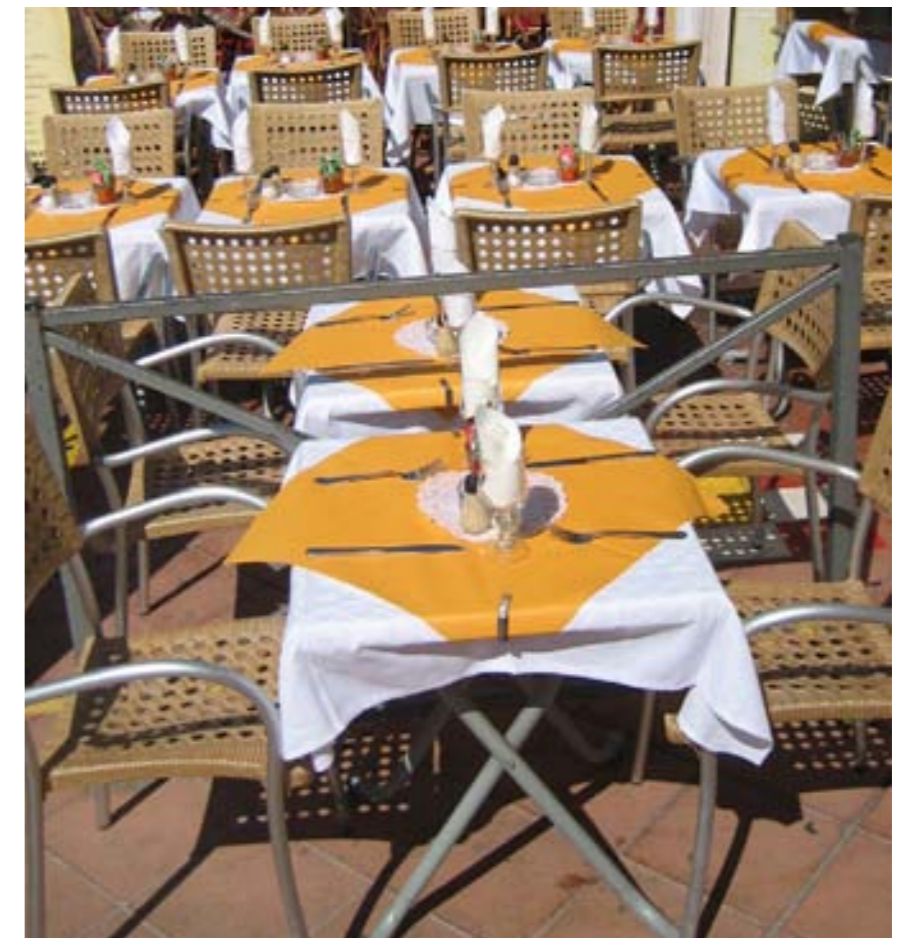
Robust, attractive frames and canopies



Daytime trading



Making the transition



Evening café space

Market Stalls

The current market stalls should be exchanged for new easily demountable units that are consistent in appearance. The elements should be compact allowing efficient storage and the canvas covers should be designed as a cohesive element that add colour and life.

A flexible style of frame will enable a range of retailing and café activities to take place.



Lighting and Power

New lighting from free standing and wall mounted units will help make the road a more inviting location and enhance the qualities of the enclosing buildings. Power supply units discretely located within the pavements will remove visual clutter from the street, allow many of the stall owners to extend their hours of trading and give cafe proprietors access to external power.



Shop Canopies and Frontages

Golborne Road retains many original shop fronts. The architectural qualities of these will be enhanced through repainting, new signing and improved lighting. Awnings and canopies will add colour, interest and weather protection for 'al fresco' eating and drinking. A consistent approach to colour and character will be required.



Street furniture

Whilst furnishings should be kept to a minimum to avoid clutter, a few elements reflecting the diverse cultural character of the area can be introduced.



Street signage

A palette of 'non regulatory' signs should be developed. These can be introduced in traditional ways, with purpose designed fittings or as unique elements designed to sit within the paving. Regulatory signs should be kept to a minimum.



Shop signage

These should be designed to reflect the nature of the businesses they promote, adding richness, individuality and character to the overall space.



Planting

Street trees of a scale appropriate to the dimensions and character of the road should be established within both pavements. Tree grills will enhance the quality of the paving and be designed to minimise the ingress of litter.

Outdoor eating and drinking

External spaces can be defined with simple brass studs laid into the paving or through 3 dimensional elements such as simple low level glass, metal or canvas screens. It will be important that these have a co-ordinated “look” and are easy to move at the end of a day’s trading.



Paving

High quality finishes, using, wherever possible, natural materials laid in a traditional manner should be introduced throughout the area. The scale of units should reflect the varying patterns of use.

Public Amenities

The public toilets in Golborne Road provide an important amenity. With a higher level of activity and more visitors additional facilities will be required, designed in a manner to be accessible by all.



Public art

Located within an increasingly strong community of designers there is considerable opportunity to bring art into the public realm. Elements may take the form of paving, free standing sculptures, signs, or perhaps imaginative window displays. In the area of the railway, Golborne Road has the potential to accommodate a large scale piece of artwork.

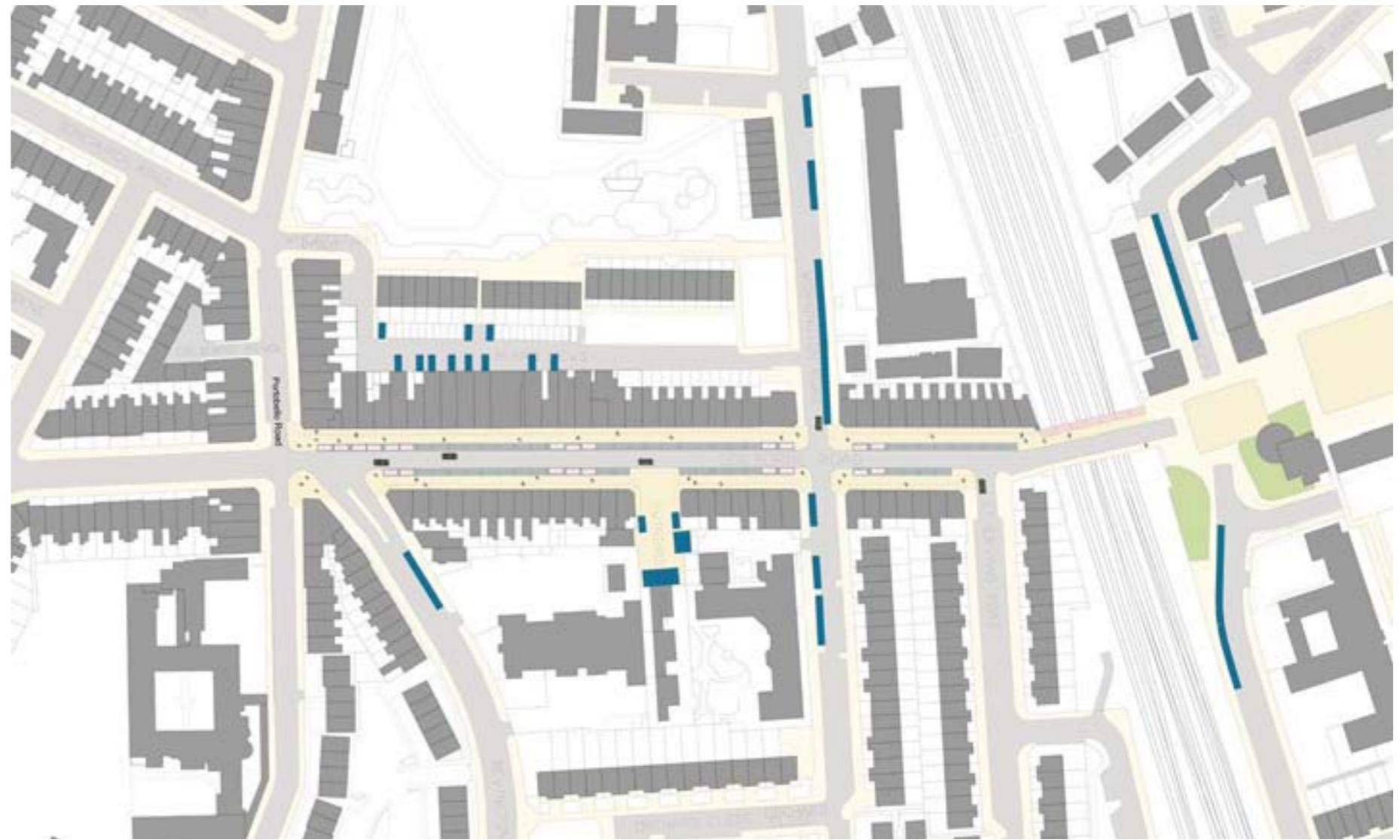


Parking- Wider Strategy

Van parking has a considerable impact on the visual amenity of the area. At present most vans are parked either directly adjacent to market stalls in the parking bays, or double parked in the street. As well as being unsightly, this hinders pedestrians from gaining a full appreciation of the street and retail frontages and as such reduces the ability of the street to attract higher pedestrian flows. It is therefore critical that these vans are parked elsewhere in locations that do not affect the street. The parking areas have been spread out to ensure that no single area becomes over-dominated by the vans. A total of 62 spaces have been provided.

Waste

Stall holders need to be encouraged to reduce the level of waste that they produce and where possible recycle. Areas for rubbish collection will be located along the street to ensure that the street is kept clean and tidy and will be specifically focused towards the food section of the market which will produce the most amount of waste.



Market trader parking provision

7. The Wider Environs

In addition to the enhancement of Golborne Road it is suggested that if improvements to Golborne Square, the railway bridge, Munro Mews and the link to Portobello Market could also be undertaken, the combined effect of this would significantly alter the external perception of the area.

Golborne Square

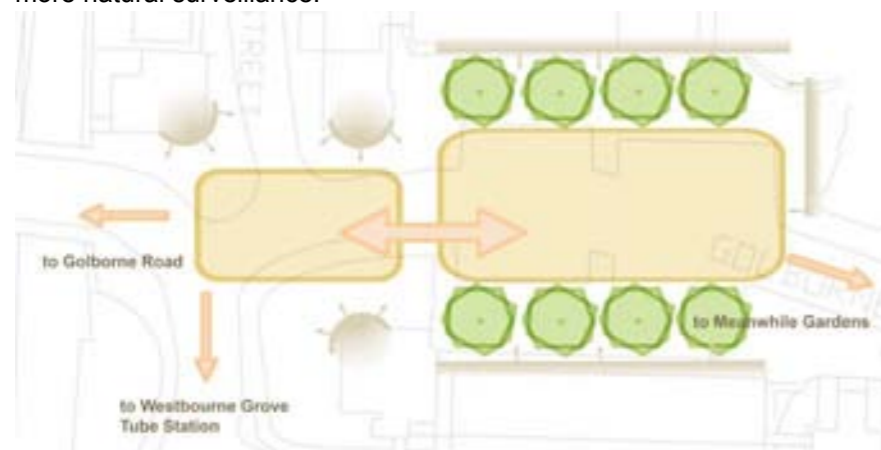
Golborne Square is located just in front of Trellick Tower and consists of an open space surrounded by a number of retail units together with a library and doctors surgery. Vehicular movement is allowed through the space and there are a series of car parking spaces which are low cost pay and display. Towards Golborne Road itself, is an undercroft set beneath a social housing block which remains unused and a significant opportunity. In addition to this, the TMO office at the base of the Trellick Tower is not occupied and could also be put to better use. Aside from the physical issues of the area, the frequent congregation of homeless people and alcoholics is of particular concern to the local community and is an issue that needs to be addressed.

Design Strategy for Golborne Square

The design strategy for Golborne Square involves the creation of a main space together with a sub-space close to the bridge. At a more detailed level the existing trees should be retained while the existing carriageway should be removed and replaced with a uniform surface that covers the whole of the area which, in turn, will allow for a variety of uses to be introduced into the square, while still allowing vehicular movement.

Retail/Café use in Undercroft

It is suggested that the undercroft in Golborne Square is used as a retail unit or for a café. This will not only make use of an under utilised area but also help to create a stronger link between Golborne Road, the bridge and Golborne Square. The security of the square will also be improved through more natural surveillance.



Design Strategy for Golborne Square - a new square able to accommodate weekday parking and a Sunday Market

The TMO office

The TMO office occupies a key location at the entrance to Golborne Square but at present contains no activity and as such is a lost opportunity. It is suggested that the office be redeveloped to accommodate a café/restaurant use which will attract more people into the area. The green space that fronts onto the TMO Office is also a missed opportunity as access is restricted by a high wall and fencing. As part of the redevelopment of the office consideration should therefore be given to removing the barriers to allow people to enjoy the space with the potential for the restaurant/café to spill out into this area.

Farmers Market on Sunday

Golborne Square would provide the ideal setting for a farmers market. The introduction of a farmers market on Sunday would serve the local community and pull people into the area that may otherwise not visit. The amenity of the surrounding residents is unlikely to be affected by this as farmers markets are quiet and operate at different times to a normal market (8am to 2pm). The management of this market will be carried out by the Golborne Road Market Manager (see Market Management) who would either oversee the whole operation or allow other operators to run this initiative under a licence.

The case for a Sunday market cannot be fully proved until tried and to do this it must be well promoted, well organised and run consistently for a period of time. The staffing and cost issues would need to remain neutral if operated by the Council. If run by an outside body, it would be their responsibility to complete their own business plan.



If the Council managed the Sunday Market, costs could be on the basis of the following:

Costs	Annual costs
1 market manager x 1.25 days per week at £150/day	£9,750
Insurance (estimate)	£1,000
Stalls hired in at £5/week each – for 20 stalls	£5,200
Stall erection - £80/week	£4,160
Stall storage – assumed free	£0
Admin and accounting - £50/week	£2,600
Marketing/promotions	£5,000
Power	£500
Cleaning - £50/day	£2,600
Total	£30,810 pa = £593/day
Income at £30/day for 20 stalls	£31,200.

The market should offer as broad a range of produce as is practical. The initial establishment of a new market is not an exact science and a degree of trial, error and persistence is usually required before a successful approach is attained. This process requires imagination and perseverance but can be achieved with little investment.

Portobello Road offers organic food on Thursdays. Currently this is not a wholly successful endeavour, due largely, we believe, to a lack of footfall on this day of the week. No clash is envisaged between the two initiatives and the study team is aware of interest in the Golborne Sunday market from several of the Portobello Market Thursday traders.

Improving pedestrian priority

The road junction at the intersection between the bridge, Golborne Square and Elkstone Road is notoriously bad and very difficult for pedestrians to negotiate. Consideration should therefore be given to the rearrangement of the junction in order to aid the connection between the Golborne Road and Golborne Square.

Trees

The trees in Golborne Square are fine mature specimens that create an attractive foil to the architectural forms, but they create a degree of overshadowing. A programme of crown reduction will alleviate this problem, whilst still retaining their 'architectural' function.

The Railway Bridge

The bridge is located towards the Trellick Tower end of Golborne Road and crosses the Great Western Railway Line. It suffers from fly posting, narrow pavements and parking on both sides of the street that creates a barrier to pedestrian movement. In addition, cyclists tend to use the pavement on the north side of the bridge, rather than using the road which narrows at this point. This is off putting for pedestrians and makes the link less attractive.

In February 2005 an urban design scheme by the Groundwork Trust looked at the feasibility of a number of proposals for the Golborne Network Rail Bridge. The project involved consultation with over 100 local residents and businesses on their opinions of the bridge. The main response from the consultation was that the bridge was generally considered to be scruffy, messy and threatening and needed to be improved through lighting, cleaning and painting.

Through this process a number of proposals were put forward as to how the bridge could be improved which included the following:

Lighting – New lighting should be installed to improve the illumination of the bridge and could include installation of LED lights that create a dramatic effect while emphasising the structure of the bridge

Superstructure – Clean and paint the superstructure in collaboration with Network Rail

Security Grille – Remove the security grille that was installed in the 1970s to prevent debris being thrown onto the railway tracks and replace it with a lighter and less visually dominant mesh.

Side Panels – Two options were considered in relation to the side panels which included either designing in the posters or design out the posters. This was left open for debate.



Book sellers on the banks of the River Seine - An example of the type of trading that could be accommodated on the railway bridge

It is important to build on the suggestions put forward by Groundwork Trust. As such the following is recommended:

Improvement

The bridge is currently covered in fly posting and advertisements which creates a negative impression of an urban environment which poorly maintained. The advertising should either be removed or organised on specific advertising boards and monitored regularly to ensure that no illegal advertising is occurring. In addition to this, the bridge should become a feature along the street that people are attracted to rather than considered as a barrier.

Wider pavement and removal of parking

A wider pavement should be introduced along the northern side of the bridge to allow easier pedestrian movement from Golborne Road through to Golborne Square. This should be coupled with the removal of parking along the northern side of the bridge to allow the introduction of the wider pavement and enhance the visual linkages. A cycle lane should also be considered either on or next to the pavement to improve the safety of both cyclists and pedestrians

Traders on the bridge

With the wider pavements in place it is suggested that traders could be placed on the bridge for the sale of small items such as books with the display boards attached directly to the structure of the bridge. Whilst it will be important to establish a strong pedestrian flow from Portobello and Golborne Roads to assist the viability of this initiative, with a suitably planned offer it could become a destination in its own right.



Making the most of the bridge - during the day and night

Munro Mews

Munro Mews is located to the north of Golborne Road. It is home to a variety of uses many of which do not naturally compliment the wider area. It is seen as an unattractive backwater that could play an important role in the regeneration of the wider area. Along the street are a series of small garages that are used in connection with the market for storage. These could be improved to provide a better facility and a location for the temporary storage of stalls.

Parking for Vans

Munro Mews represents the ideal opportunity for van parking associated with market as it is very close to Golborne Road and the vans will not have a visual impact. In addition to this, it would be possible to redesign the storage areas to include a 1 or 2 storey workspace scheme over the ground floor storage and have a review of any other potential areas in the Mews for similar activity.

Live/Work Units

Munro Mews presents the opportunity to incorporate a number of live/work units that could replace the existing garages that are in a poor state of repair. In keeping with the contemporary nature of many of the emerging design businesses in the area, additional premises, such as those established at Trinity Buoy Wharf on the banks of the Thames, could be introduced to create an immediate impact, at a relatively low cost.



Container City - An example of Live/Work units that could be incorporated into Munro Mews

Link to Portobello Road North

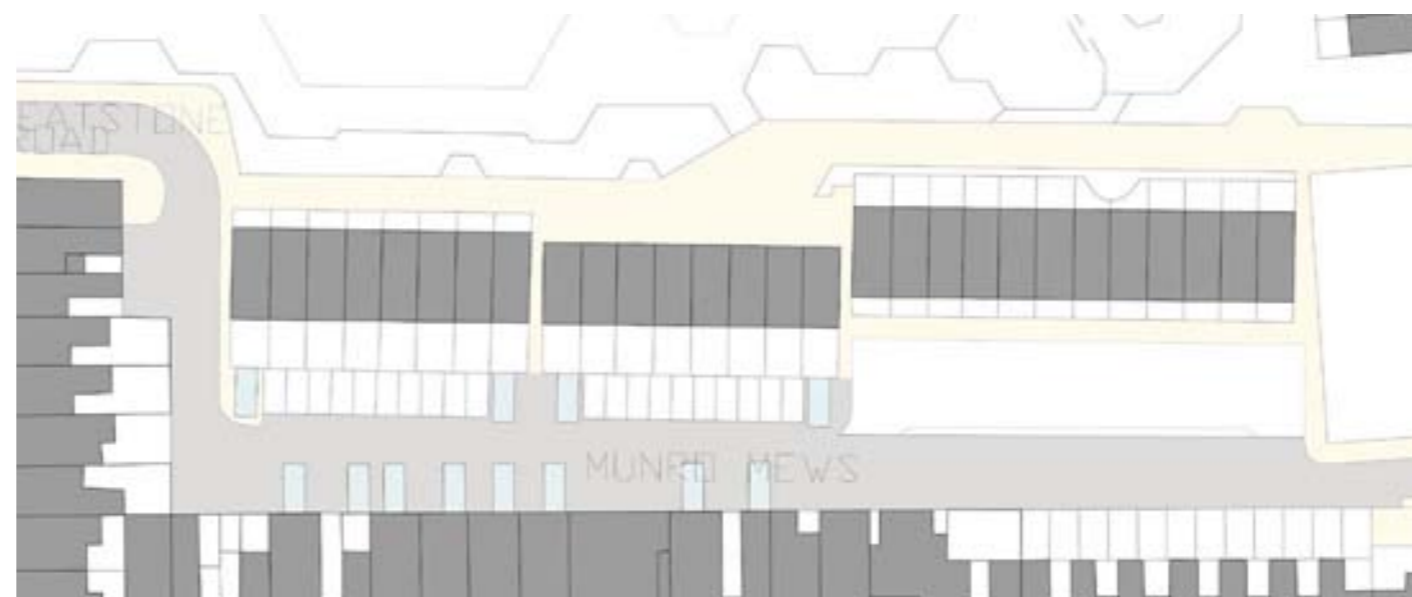
On a Saturday, market activity in this location helps to create a link between Portobello and Golborne Road markets. On non-trading days the route is quiet and unattractive, generally flanked by blank brick walls. Several enhancement solutions have been considered that range from the introduction of new lighting, tree planting and signing, to the permanent relocation of the current Golborne Road market traders. Whilst such a move would help to create a more lively street scene, it is considered that the loss of market trading from Golborne Road would have a detrimental effect. Information taken from the Intelligent Space Study indicates that footfall generated by the market is important for the shops and that much of this during the week comes from directions other than Portobello Road North.

The Intelligent Space Study also projects that splitting the market from the shops would achieve little in the long term and economic harm in the immediate future.

Physical changes to the street would therefore appear to be the most appropriate approach with a programme of work that enlivens the enclosing walls, established more street trees and improves lighting and signing..



Munro Mews as it exists



Van parking arrangement for Munro Mews

Van parking spaces

8.0 Costings and Implementation

Indicative Costs

Essential

- Specific management
- Redefined Road
- Stallholder recruitment

High Priority

- Power Supply
- Signing
- Promotion

Medium Priority

- Physical enhancement of the public realm
- Enhancement of shopfronts
- Enhancement of railway bridge

Budget Costs for Streetworks to cover

- Repaving
- Lighting
- Furnishings
- Tree Planting
- Infrastructure (Drainage/power/water)
- Decorative works to Bridge (inner faces)

Implementation Costs for Comprehensive public realm scheme				
GOLBORNE ROAD MARKET		FEB 2006. USM.		
Essential elements				
POSSIBLE WEEKDAY OPERATION (See Note 1)				
	Unit	Quantity	Rate	Total
<i>Specific Management - Per Year</i>				
Market Manager (Note 2)	days	365	£90.00	£32,850
Insurance – public liability (estimate)	item	1	£4,000	£4,000
Stalls (Note 3)	unit	0	£0	£0
Stall erection (Note 4)	week	52	£600.00	£31,200
Stall storage	week	52	£80.00	£4,160
Admin and accounting (Note 5)	week	52	£150	£7,800
Enforcement (Note 6)	week	52	£180	£9,360
Marketing/promotions (Note 7)	item	52	£350	£18,200
Power	item	0	£0	£0
Cleaning & waste removal (Note 8)	week	52	£350	£18,200
Office costs, phones, copying, rent, rates etc. (Note 10)	week	52	£70	£3,640
Maintenance of stalls and equipment	Year	1	£2,000	£2,000
Contingency	Year	1	£5,000	£5,000
		TOTAL		£136,410
NOTES				
1. Based on 200 stalls per week, rent as at 2005 figures. Capacity is currently 72 stalls per day.				
2. Market manager – 1.5 people. Cost is shared with town centre functions, thus total fee of £50,000 is split to include market.				
3. Stalls are purchased as part of the overall capital improvements. Cost £500 each x 60 = 30,000. This figure can be increased for bespoke design.				
4. Stall erection assumes 1.5 people employed				
5. Admin assumes market accounting undertaken as part of overall Market department work				
6. Enforcement assumes this is part of the overall Enforcement function for the Borough				
7. Marketing/promotions includes recruitment of stall holders and promoting the market to the public				
8. Cleaning assumes that the market is part of the overall street cleaning for the street				
9. Power. This would be provided but charged back to the traders				
10. Office costs – assume half as shared with wider High Street initiative				
POSSIBLE WEEKDAY INCOME				
	Number	Cost	Annual	Less 15% Annual Income Vacancy
6 day traders - £49/week for 48 weeks (4 weeks holiday)	10	£2,352	£23,520	£19,992
2 day traders (Fri/Sat) - £46/week for 48 weeks	62	£2,208	£136,896	£116,362
		TOTAL		£136,354
Possible extra weekday income after successful growth				
55 casual traders at £10/day, no holiday allowance	55	520	£28,600	£24,310
		TOTAL POSSIBLE INCOME		£160,664

GOLBORNE ROAD MARKET		FEB 2006. USM.		
POSSIBLE SUNDAY MARKET OPERATION IF RUN BY RBKC				
	Unit	Quantity	Rate	Total
COSTS				
<i>Specific Management - Per Year</i>				
Market Manager	days	65	£150	£9,750
Insurance (estimate)	item	1	£1,000	£1,000
Stalls hired in at £5/week each – for 20 stalls	unit	20	£260	£5,200
Stall erection	week	52	£80	£4,160
Stall storage – assumed free				£0
Admin and accounting	week	52	£50	£2,600
Marketing/promotions	item	1	£5,000	£5,000
Power	item	1	£500	£500
Cleaning	days	52	£50	£2,600
		TOTAL		£30,810
INCOME				
For 20 stalls at £30/day	week	52	£600	£31,200

8.0 Costings and Implementation

Golborne Road Study area total: 11210 m ²				
Golborne Road West	5210 m ²			
Bridge	490 m ²			
Swinbrook Road	510 m ²			
Golborne Square	5000 m ²			
Length of street - Golborne Road west:	255 m			
Average width of street	20.5 m			
Length of bridge section	36 m			
Length of Golborne Square:	122 m			
Average width of square	48 m			
Description	unit	quantity	rate	total
Site clearance	m ²	11210	20	£224,200.00
<i>Golborne Road West</i>				
Paving: pedestrian areas	m ²	2350	120	£282,000.00
Paving: stall / parking areas	m ²	975	120	£117,000.00
Paving: Swinbrook Road	m ²	510	120	£61,200.00
Paving: carriageway	m ²	1885	60	£113,100.00
Paving: kerbs / trims	ml	1150	70	£80,500.00
New drainage within ped area	m ²	3325	25	£83,125.00
Adapt drainage within carriageway	m ²	2395	25	£59,875.00
Minimal road reconstruction (15%)	m ²	300	40	£12,000.00
Street furniture	item	1	45000	£45,000.00
Information signage	item	2	7500	£15,000.00
Trees	unit	14	2000	£28,000.00
Uplighting to trees	unit	14	500	£7,000.00
Columns along street	unit	16	5000	£80,000.00
Wall mounted brackets	unit	8	2500	£20,000.00
Electrical work / connections	unit	38	750	£28,500.00
Semi permanent market stalls	unit	19	5000	£95,000.00
Power supply for stalls	ml	510	50	£25,500.00
Sub Total				£1,377,000.00
<i>Works to the bridge</i>				
Pedestrian areas	m ²	270	120	£32,400.00
Carriageway	m ²	220	60	£13,200.00
Kerbs / trims	ml	70	70	£4,900.00
Adapt drainage	m ²	490	25	£12,250.00
Artwork to bridge structure	item	1	40000	£40,000.00
Lighting for the above	item	1	20000	£20,000.00
Stalls along bridge	unit	7	2000	£14,000.00
Sub Total				£136,750.00

Description	unit	quantity	rate	total
<i>Golborne Square</i>				
Pedestrian / stall areas / parking	m ²	3165	120	£379,800.00
Grass / vegetation area	m ²	650	50	£32,500.00
Carriageway area 1	m ²	625	120	£75,000.00
Carriageway area 2	m ²	560	60	£33,600.00
Kerbs / trims	ml	340	70	£23,800.00
Adapt drainage	m ²	5000	25	£125,000.00
Street furniture	item	1	25000	£25,000.00
Power supply for stalls etc	ml	255	50	£12,750.00
Columns along street	unit	8	5000	£40,000.00
Lighting to trees	unit	12	1000	£12,000.00
Sub Total				£759,450.00
<i>Other adjoining areas</i>				
Tie ins to adjacent roads etc	item	1	25000	£25,000.00
Improved signage	item	1	25000	£25,000.00
Sub Total				£50,000.00
Total for works				£2,323,200.00
Contractors prelims / overheads	item	15%		£348,480.00
On site contingency	item	10%		£267,168.00
Grand total - implementation				£2,938,848.00
Cost per m ²				£262.16
The above excludes the following:				
<ul style="list-style-type: none"> • Public art and water features • Total reconstruction of paved areas, unforeseen ground conditions • New underground services and drainage • Highway electronic traffic signals • CCTV • Repositioning of telephone boxes and feeder pillars • Price inflation • Local authority fees and charges • Value added tax • Professional and all other fees 				

9. Conclusion

Golborne Road is a unique and interesting urban environment that has a wealth of character and interesting features. It is retail street that has a wide variety of different shops many of which are family run businesses rather than multi-nationals. As such it does not suffer from the bland clone offerings to be found in similar locations. It also has a market that attracts locals and visitors and is particularly active on Friday and Saturday. These are very important positive attributes that need to be retained if the street is to be successful in the future. As such, any intervention needs to be carefully considered to ensure that the qualities that currently exist are not lost in the process of change.

Considering Options

When considering options for the street, both a “no intervention” and a “no market” scenario were entertained. The suggested option of improving the street and the market is likely to provide an acceptable balance between the introduction of new ideas and arrangements while retaining the character and unique charm of the street.

Management of the market

Managing the market is an essential part of the strategy and will be key in creating a successful urban environment. The introduction of particular market uses in specific areas along the street will reinforce the image of the goods available along Golborne Road and therefore people will be more aware of what is available when visiting the street. The introduction of semi-permanent stalls will be beneficial for a number of reasons but will be specifically useful in avoiding market-parking conflict during the focused market days.

It is obvious that all these aspects need to be managed properly in order to be successful. Establishing a new position of Golborne Market Manager will enable Golborne Road to be given the attention it deserves rather than being secondary to Portobello Road.

Economics

The commercial environment of an area is its lifeblood and Golborne Road needs to function economically if it is to survive and flourish. It became clear from the business surveys that many of shops are in the balance in terms of economic viability and it is critical that the strategy for the street does all it can to assist their well being and enable them to remain and prosper. Indeed, it seems that the decline in the market over the years has brought a decline in visitors to the area and as a consequence the shops have suffered. Shop keepers as well as others are therefore keen to see the market retained as this is likely to improve their trading pattern.

Physical

At present Golborne Road is a wide street which, though attractive and interesting, could be improved. The introduction of a new management system will help in achieving this but it will need to be reinforced by the following:

- Widen the pavements to provide more amenity for pedestrians
- Introduce a multi-use area for car parking and stalls that is continuous with the pavement but distinguished through a difference in surface materials/textures
- Reduce the width of the carriageway to reduce the speed of traffic and deter double parking
- Improve lighting along the street and provide power for stalls and outdoor cafes
- Introduce signage from the main public transport nodes to encourage and guide people to Golborne Road
- Enhance the public realm with improvements to frontages and pavings
- Enhance the bridge as a main feature along the street that encourages movement rather than acting as a barrier.

Promotional Activity

A more varied market offer, including a specialist food/farmers market would help to create a stronger draw for visitors. The wider area is already famous for its carnival but a rejuvenated Golborne Road could become the focus for a variety of complementary events that could attract visitors throughout the year.

Through this varied approach, it is envisaged that Golborne Road can become both a more attractive and vibrant urban environment as well as retaining the traditional family businesses and market that have long been located along the street.



**Appendix 1:
Key Stakeholder Interviews**

Key consultees that were consulted:

Michael Flanagan
RBKC
Head of Estates

David McDonald
RBKC
Principal Planning Officer
Conservation and Design
Directorate of Planning Services

Mahmood Siddiqi
Chief Traffic Engineer
Directorate of Transportation & Highways

Deputy Mayor Councillor Dr Iain Hanham

Councillor Nicholas Paget-Brown
Cabinet Member for Regeneration
Community Safety, Waste & External Relations

Sara Clarke
RBKC
Economic Development

Richard Craig
RBKC
Senior Urban Designer
Planning & Conservation

Mike French
RBKC
Head of Planning

Emma Ogden
RBKC
Market Manager
Area Manager (Markets & Environment)

Nick Kasic
RBKC
Assistant Market Manager

Sarah Cutter
RBKC
Enforcement (market)

Kalim Anwer
RBKC
Enforcement (market)

Gary Elliott
RBKC
Senior Contract Officer, Waste Mgt

Andy Almond
RBKC
Contract Officer Waste Mgt

Derrick Abdula
RBKC
Enforcement Manager

Abdul Kalim Kubica
Operations Manager

Tim Harding
Metropolitan Police
Safer Surer, Golborne Ward

Mark Conyers
RBKC
Housing Regeneration Manager

Anna Geenty and Susie Parsons
Golborne United

Susie Parsons
Golborne United

Ainsley Walcroft
RBKC
Governance Administrator

Paul Palmer
RBKC
Borough Valuer

Cllr Pat Mason
RBKC
Ward Councillor

Cllr Stuart Shapro
RBKC
Ward Councillor

Cllr Bridget Hoier
RBKC
Ward Councillor

Cllr Des O'Neill
RBKC
Coleville Councillor

Katy Aubeelack
Crime Prevention Officer

Gordon Deaville
Chair of Kensal Youth Club

Lauren Daley
Venture Community Association

Tom Fitch
Charity shop (under Westway)

Fadi Hani
Vice Chair K+C Faith Forum

Dan Eastmond
Number 10

Louise Brewood
Broadway Market Traders Association

Ben Randall
Marsh & Parsons

Ben Ruddy
Stella McCartney

David Martin
Peter Kandler & Co.

Colm Gough
Golborne Shop Keeper

Adam Withington
Great Western Studios

Connor Kilbane
Catalyst Housing Group

Nicola Weaver
RBKC EDU
Statistics

**Appendix 2:
Business Survey Results**

Introduction

Below are main results from the Shop keepers and Market Traders' Survey, 2005 which were undertaken over the summer months, on a wide range of weekdays and Saturdays during most operating hours. We are grateful to those businesses who were willing to put in the time and effort to undertake the surveys.

Each survey took approximately 30-40 minutes and was done on the basis of the interviewer filling in the questionnaire. Where frontages were closed, we posted the survey and a note asking for the business to call us. Where possible all those not responding were chased by phone or email, or with follow up visits.

- The survey covered Golborne Road itself, the area around Trellick Tower, the North section of Portobello Road (starting from the shops on the South side of the junction with Golborne Road and then moving Northwards)

- A total of 104 businesses were surveyed. This is the figure we used to prepare the percentages.

- There are 112 shop frontages, of which 88 were surveyed. Several shops refused to take part in the survey, either because they were not interested or because they thought that giving any information to this Council initiative would be somehow dangerous. In addition there are several vacant shops and others that have been turned into residential uses. Where voluntary, office or professional uses occurred, we tried to get relevant people to answer the surveys, but this was not always possible.

- Approximately 32 market traders operate in the street, of whom 16 have been surveyed. The summer season meant that half the traders were either on long holidays (a particular habit in this street) or were trading at various other locations over the period.

The findings

There is a wide range of businesses, from butchers to bespoke interior design.

- 24% sell food and provisions
- 15% are in pubs/restaurants and cafes
- 14% in antiques and second hand
- 12% in services
- 5% are hairdressers.

The major draws for Golborne Road are considered to be:

1. Diversity of shops/businesses (21%)
2. Market (19%)
3. Ethnic diversity of the community (15%).
4. Portobello Market (13%)
5. Atmosphere & vibrancy (13%)
6. Cafes (10%). The Lisboa is mentioned more than others with 4% of the total.

The main positive points are considered to be:

1. Diversity of the shops/businesses (16%).
2. Atmosphere & vibrancy (14%).
3. Ethnic diversity (13%).
4. Community spirit (12%).
5. Market (12%, of which 4% mention Portobello Market).
6. Cafes/food (5%).

The main negative points are considered to be:

1. General parking issues (35%, of which 8% relate to lack of parking for businesses, 6% lack of parking for shoppers, other points raised include double parking).
2. Crime/drugs (17%).
3. Cleanliness and rubbish (9%).
4. Traffic moving too fast (8%)
5. Change taking place (gentrification and unsuitable new businesses – 4%)

The main improvements suggested are:

1. General parking improvements (32%). Of which 8% are for business parking permits.
2. Rubbish and cleanliness (12%).
3. General market improvements and more stall variety (12%)
4. External improvements to the street (9%).
5. More Policing/CCTV (9%)
6. Traffic calming (5%).

Businesses and customers

- The majority of businesses have been in existence for over 10 years (66%). 10% are up to a year old.

- A high proportion of the shop keepers/owners live either locally (32%) or in the area (55%).

- Most are sole traders (71%) while 17% are limited companies.

- Most aim to continue trading (8 do not due to poor trade) and either stay the same in terms of size, or increase. 10% reckon that they will reduce in size.

- 78% of the traders rent their premises, while of those 61% have leases (with over 10 years left). 18% have less than 3 years remaining. The market traders are all on annual Licence agreements.

- Most customers are regular (65%) of which 42% are locals and 23% come from the wider London area. Passing trade accounts for 19% of locals and 26% from out of the area.

- Over the last 3 years trading patterns have been lower for almost half (48%, with 6% of those doing much worse). 34% have been doing the same level of business, while 18% have seen an improvement.

- For footfall levels in the last 2 years, 2% consider it to have declined a lot, while 39% consider it to be less and 42% the same. 17% consider that footfall has increased.

- Reasons for changes to trading and footfall patterns were largely unknown, though those that mentioned negative aspects noted the difficulty loading and unloading and other parking issues, along with increased levels of crime, higher rent and rates and the poor economy. More positive aspects mentioned included a reduction in crime (in particular the drug dealing in front of shops has been severely reduced in the last 2 years due to a positive local crime initiative)

- The busiest trading days are Fridays and Saturdays (for 75% of the businesses) while Wednesday is the least busy day.

- Most do not advertise (66%), and several noted that for marketing, they rely

on word of mouth more than anything else. For those who do advertise the most used forms are the local papers and magazines. A small percentage manage their promotions by getting features and mentions in editorials and claim that these are the best forms of marketing.

- Most of the shops are open 6 days a week, while the market traders are mainly operating from Wednesday to Saturday. A small number of the shops open on Sundays.

- For staffing levels, 39% of the businesses have 1 full time member of staff, while 18% have 2. 77% of the businesses have fewer than 5 employees. One business employs over 25 people. 18% of the businesses have 1 part time member of staff.

- Impact of Congestion Charge - the majority see this as a threat (70%), with less trade and very negative impact. 5% are unconcerned.

- Traders Association - most say they are interested in getting information (85%) and participating (62%). Half the market traders said that they did not know about the Portobello Management Committee, while one said he was interested in taking part in it.

- Business Improvement District - the majority of businesses are not interested in a BID (81%). They consider that they pay enough rates already and organising this would be over complicated. 19% said they liked the idea and would need more information on it.

- Property - the upstairs areas are mostly used for residential (92%), with some commercial. 3 are not used.

- There were some separate questions for the market traders. They use a mixture of ways of parking – including pay & display, on street in market pitches and in the wider area. Most pack their stalls away at night and they use a variety of ways to store their goods (including shops, home, vans, Munro Mews units). For power there are also a variety of methods – from using the street bollards (very few work and fewer have accounts to use them) and taking power on agreement from shops. Most on the South side have never had power and the currently traders are not too interested in having it.

Other ideas on the development of the street

Retail:

- The majority wish to keep the existing retail with the general interesting mix of shops
- Some suggested trying to get a bank or at least cash machine (that does not charge when used).

Market:

- The majority of comments made in this survey related to the the Market.
- Fill the pitches
 - Have more market days (e.g. Sundays to avoid the Congestion Charge)
 - General improvements
 - More variety of stalls to diversify the overall offer in the street

Parking:

- Many suggested dealing with the detailed problems that they outlined earlier in the survey.
- Very few agreed with cutting parking out or stopping through traffic

Policing:

- Many wanted more and constant policing.

Other comments were:

- Leave it as it is
- Do not “yuppify”
- Tidy it up.

Shop Keeper / Trader Quotes

Below are a range of quotes from shop keepers and market traders on various Golborne Road related matters. The quotes come from traders expanding on their answers to the questions in the survey. They are not graded by preference or % of answers, but give a flavour of the opinions of the shopkeepers and market traders in their own words.

Distinctiveness & visitor impact

- “Golborne Road’s cultural mix attracts customers” (Shop owner/manager)
- “I would like Golborne Road’s personality used to make it distinctive in comparison to Portobello Road” (Market Trader)
- “Golborne Road’s major draw is its Moroccan community” (Market Trader)
- “Don’t turn it into something else, you’ll never get it back” (Market Trader)
- “Portobello Road is too touristy and busy. Golborne Road would be a great alternative” (Market Trader)
- “90% of my customers attend the mosque” (Market Trader)
- “The Muslim Centre has helped to bring more customers on Fridays” (Market Trader)

Retail environment

- “Don’t fall into the trap of following a ‘new scene’ - let the area thrive on its own” (Shop owner/manager)
- “I would like to see the uniqueness of the Road preserved. However, financial concerns have forced me to rent my shop out to yet another hairdresser” (Retiring Shop owner/manager)
- “A Starbucks approach will increase rent for people like me” (Shop owner/manager)
- “I am not interested in a BID (Business Improvement District), its bureaucratic” (Shop owner/manager)
- “I just run the shop to keep busy, all my regulars are dead!” (Shop owner/manager)

- “12 years ago the market was full and there were no parking restrictions. Traffic wardens have killed a lot of trade and we have lost business” (Shop owner/manager)

- “This will turn into Ledbury Road which is not a good thing” (Shop owner/manager)

- “We are in a dip in the economic cycle and I have seen it come and go. 10 years ago we were ok, then trendy and now struggling - it will pass” (Shop owner/manager)

- “The road has gone for people like us. There is nothing here for us” (Shop owner/manager)

- “I do my business, pay my taxes and the council do nothing” (Shop owner/manager)

- “The road has too many rules and regulations. Regulations will lose traders and impact badly on businesses” (Shop owner/manager)

- “The road needs a cash machine” (Shop owner/manager)

- “Don’t have an all A3 (hot food) pretension. The Council will not allow more A3” (Shop owner/manager)

- “I am concerned that ethnic minority businesses will be forced out” (Shop owner/manager)

- “All my staff live within 1 mile” (Shop owner/manager)

- “Police and wardens drive away customers on Friday and Saturday” (Market Trader)

Market activity

- “There is a symbiotic relationship between shops and stalls. Even if we sell similar stuff, we must not cut our noses to spite our face” (Shop owner/manager)

- “Shops complaining about traders should see the bigger picture and not kick ‘em out” (Shop owner/manager)

- “Don’t sanitise the market, keep it eclectic, keeping the parking chaos as it is if need be” (Shop owner/manager)

- “Golborne Road is not your run of the mill market, its Arabian influences make it more like a souk” (Market Trader)

- “I’d like to see the market expand, it has a nice atmosphere and will improve the area, attracting more shops and improve quality” (Shop owner/manager)

- “The market keeps the shops going” (Shop owner/manager)

- “The market is important, especially Fridays.” (Shop owner/manager)

- “20-30% of my cafe’s customers are due to the market” (Shop owner/manager)

- “There are not enough stalls on the market” (Shop owner/manager)

- “It’s not a major money maker, I get £10hr for time and preparation” (Market Trader)

- “I would like to see a food zone and covered seating area” (Market Trader)

- “My stall needs a trailer but RBKC will not allow me to use one” (Market Trader)

- “I would like tables and chairs for my stall but I’m not allowed” (Market Trader)

- “The market needs to be fuller, many stalls are very old” (Shop owner/manager)

- “We need more food and fashion stalls” (Market Trader)

- “I would like to open on Thursday but the Licence forces me to close at 1:30” (Market Trader)

- “A Sunday market would improve trade for us all, especially with the expansion of the congestion charging zone” (Shop owner/manager)

- “The market needs better promotion and its pitches are too small” (Market Trader)

- “This is a market not High Street Kensington” (Market Trader)

- “Charity shops are too pricey for my clients, the market is still very working class” (Market Trader)

- “The market management is too regimental.” (Market Trader)

- “Market trade ends too early” (Shop owner/manager)

- “We furnish some of our other shops from the antiques market, it is a great mix of good and bad” (Shop owner/manager)

- “Portobello traders buy stock on the Golborne Road and then sell it on” (Market Trader)

- “Market traders selling food undermines my business” (Shop owner/manager)

- “With regard to the food wagons, don’t kick up a hornets nest just to get a small improvement” (Market Trader)

Urban design/road & street issues

- “No one sees what is on Golborne Road from the corner of Portobello” (Market Trader)

- “People stop coming up Portobello at the railway bridge, there is nothing to bring them through” (Shop owner/manager)

- “There are too many spaces for residents parking that are not used all of the time.” (Shop owner/manager)

- “Use Munro Mews for parking” (Shop owner/manager)

- “Pedestrianise the road, locals walk here and don’t need to park” (Market Trader)

- “Cars are driven recklessly down the Road, occasionally hitting stalls” (Market Trader)
- “Either make the Road one way or much narrower, cars drive too fast” (Market Trader)
- “The Road needs to be one way on Friday and Saturday” (Market Trader)
- “Stop the traffic on Friday and Saturday” (Market Trader)
- “Find a large car park for shoppers at the weekend e.g empty school” (Market Trader)
- “The bridge needs to be improved, it’s a bit scary” (Market Trader)
- “Barriers are needed on the bridge, my son was almost killed leaving the shop” (Shop owner/manager)
- “The council lacks the necessary fortitude to manage the street” (Shop owner/manager)

Crime and Safety

- “Not much is open here at night, I’m not sure if it is safe” (Shop owner/manager)
- “The area is heavy at night, there are too many muggings” (Market Trader)
- “This is the new front line that has moved from Westborne Grove” (Shop owner/manager)

Cleaning

- “Street cleaning needs better management, I have to do it sometimes!” (Market Trader)
- “The street litter bins were removed 5 carnivals ago (5 years) and we need them back” (Market Trader)

1996 Business survey

In 1996 Donaldsons undertook a business survey of Portobello Road for City Challenge. This is the only comparative survey that we could find that has been undertaken in the area.

While not really overlapping with our work, they found that almost 2/3 of the retail businesses did more trade at the weekend and almost 3/4 considered that the market was an asset to the area.

The majority of businesses considered that most visitors came because of the market rather than being drawn by the shops.

At that time, car parking was the major concern for businesses, followed by congestion around the market.

Market traders considered that their customer base was from London (39%) or from abroad (49%). The market trader survey was dominated by antique traders.

**Appendix 3:
Residents Survey Results**

(Consultation evening 28/6/05)

Q1 What do you like about the street, shops and market and why?

- The variety, friendliness – Golborne Road is quick food – over the bridge for dinner
- Brilliant eclectic mix of great food shops and market, bric a brac and useful services eg solicitor, the law centre, dry cleaning
- Old fashioned nature, Trellick Tower is iconic and major influence – independent grocers – good
- It's lively and got character
- Culturally diverse – reflects local area – second hand market is good – market and street is mixed, everyone fits in
- Nice balance – a bit unusual and practical not like Ledbury Road
- Working community and shops. Shops not found elsewhere. Local community functions. Is nearest local market. Has everything Moroccan community and other minorities need. Needs parking for traders and visitors. Also mosque needs parking. When closed on Sunday place becomes 'scary'. No account taken of religious festival – needs car parking etc. Need to accommodate muslim festivals.
- Easy access for local community eg halal butchers. Market is poor in choice
- Community feeling. Very good fruit and veg on market. Good Friday stalls + bric a brac
- Came here due to character and liveliness. Lacks food stalls
- Generates a lot of tourists. Rich mix of people – not one dominant group – mustn't end up being trendy and unaffordable. All individual shops – lots of trading – Going to the mosque, going to the café
- Concern of activity in mews – concern at congestion charge. Market must stay – changes and evolves all the time, shop prices very competitive
- Broad spectrum of community – good variety. Stella McCartney – Historic influence of convents. Pet shop very popular + fish shop + patisseries
- Very good set of local shops
- Character of the street. Enhancing the area will be very complex. Very easy to destroy the character. Coffee culture, food culture, food stall and restaurants
- Street cleaning
- Anti-social behaviour is a problem. You get a good busy atmosphere, good ethnic mix, eclectic shops

Q2 What other services/shops/activity would you like to see?

- Local people do not want change
- Organic fruit and vegetable shop or stall
- Poor end in antiques – start here and end up in top end of Portobello – there is a cycle. coming in from countryside to the markets, then the shops
- No commission free cash points
- Cafes are good but there are not enough – A community information store would be useful
- What's there at the moment – shouldn't put what's in Portobello Road here
- Another off licence – Record shop – Maintain a mix – 2nd hand bookshop – Needs a multi purpose community centre – Extra curricula activity
- Very small mosque – so cannot provide facilities for disabled and women – People tend to hijack the road
- Stalls on one side of Portobello Road (our end) bring stalls together, make stalls in Portobello Road (opp 375) parking – better lighting
- None really as would it would bring more tourists
- Enough cafes and hairdressers but only 5 restaurants - Worrall Thomson opened a restaurant in the area but it closed after a year - The Grove used to be good – Bed Bar is good
- Support required for local community – area won't support more specialized shops
- Shops should be done up a bit – repaint – do shops serve community? do we need as many cafes? all basics of life available
- Shopping is already provided in Westbourne Grove + Tesco + Sainsbury. Lots of food at carnival time – more restaurants – strengthen role of community centre, pest control is needed because of rats
- Need more activities for the elderly
- Street food which is Moroccan is overrated and needs to be improved - improved street cleanliness
- Can't buy loaf of bread or a pint of milk – no late night shop

Q3 What would you change e.g.physical/street/pavement/furniture/lighting/parking arrangements?

- Needs dividing out – Either pay and display or trader – the shops are wholesale so they need vehicles – Double parking is a problem – Avoid planters people hid drugs in them – Not too many trees
- Enforce parking restrictions. clean up the railway bridge, more flowering planters, hanging baskets etc
- Shop fronts are nice – Security cameras might help – It doesn't feel that safe – Trees would be good
- Something to prevent double parking – Pavement should be kept properly
- Better lighting – Better quality paving – Parking needs sorting out
- It's not clean and there are lots of rats
- Keep kerbs – Attention is needed to paving – Shop fronts improved + flats above improved – Don't like bollards – Get away from Victorian look
- No traffic on Fridays and Saturdays – Block off street. Can use side roads for access. Lots of incidents and bad atmosphere. Concern about congestion charge impacts, affecting visitor numbers. Problem for mosque.
- Mediterranean feel on design eg to lamp posts, to unify design + use traditional festivals to do things
- Not much really. It is dirty. It is a dumping ground for rubbish
- There is less space for residents to park since CPZ was introduced - Double parking is a problem + white vans parked at night. Leftover cardboard should be recycled
- Tidy up shops outside Trellick – See Church Street Paddington Market (Marco neighbourhood) Bottom up approach should be used – Market and residential neighbourhood renewal
- Traffic chaos particularly on Saturday - Conflict with buses – Why are cars allowed cars to park on bridge. Lighting is OK. A few more community officers are needed
- Improvements need to be made to the lighting – Doesn't feel uncomfortable during evening – Parking very difficult for visitors and restaurants
- There is no public transport
- No public transport – No real pubs – No bus route – night buses
- Keep benches – Rubbish is a problem. Lick of paint is needed. Keep it clean. Greenery/trees are needed. Parking is a problem

Q4 How do you feel the market along Golborne Road should evolve?

- Don't design the residents out of the road
- It should remain as a very important local feature and should not be tidied up. More stalls would be good – second hand books + organic food + plants
- Can improve
- Just right – just enough people
- Like it as it is
- Encourage farmers market.
- Reduce drinking in the area
- Needs more publicity. Reduction in traffic and people congestion. Busier than it used to be. No change – just improve it. Should stay for local people. Sort out parking. Cleaner streets. Moroccan people will travel a long way – from other cities. Moroccan theme very special. Suspect Agenda to close the market
- Double parking is a real problem. Elkstone Road crossings poor
- Keep as is – magic will get lost
- Needs more activity - anything but no fish stall outside fish shop. Shops – make rents. Sundays can park outside! leave it
- Protect shop keepers rent, help with tidy up/repaint shop fronts – but don't increase rents. See photographs – in college – of all shop traders.
- Can the bridge be cleaned up and painted? Garages to Munro Mews a problem – no consideration of others.
- Significant change over last 10 years – good health standards. Already a broad spectrum of goods sold – more furniture/more expensive range now sold.
- Stalls should be cheaper on Golborne Road which would encourage to take up pitches. Night market 1 or 2 nights a week?
- Should be extended
- Market should have a food/culture theme - Need more women – male dominated Moroccan culture.

Q5 What do you feel should be done with the space in front of Trellick Tower?

- Seats need to be removed and something else needs designed in. Needs a paint. It's a social area, not yuppie
- Stalls and planters to cheer it up - Introduce an outdoor performance space for street entertainers
- A bit rough – if you are local its OK – no attractions
- Nice as it is – fly posters should be regulated on the bridge
- Not nice to walk around - needs to be safer, brighter and more welcoming
- The canal is not safe enough
- Use it for car parking - No particular view on the space
- Make into more parking for customers
- Not sure – it needs work
- I like bridge with posters – ever changing poster art. It is pretty good – do your square there if you want urban design. Meanwhile Gardens is great.
- The space is used by buses – 3 bus routes 23/7/295
- Good chemist/library – supply local needs. Bus route might prevent other uses. Can be congested, difficult to see pedestrians from cars.
- Introduce a café to sit outside!!
- Introduce a farmers market and grass around the base of Trellick Tower.

Q6 How do you think pedestrian/vehicular movement could be improved along Golborne Road?

- Parking problem - big conflict. Wardens don't go without police protection – The system is confusing: spaces are used both as pitches for traders and pay + display
- Enforce the parking restrictions - double and triple parking should not be allowed and sort out storage for stallholders
- Cars are a problem – The road could be closed on Saturday
- Barrier at 10am each morning – open at 6pm so no traffic when market on Friday and Saturday
- Something needs to be done
- Congestion charge – if we are left out the street will be a rat run. Put it in the congestion charge zone
- Problem of street access is a by product of a good market
- On Fridays and Saturdays the road width needs to be restricted. One way at most. Speeding a real problem in the area. 70%-80% of local community are Moroccan. 'Nice place to live'. Nigerians and Somalis moving into the area – muslim community facilities. Muslim mosque attendance growing. Feel 'bullied'.
- Parking should only be allowed on one side of the bridge to allow bikes easier movement. If parking in Golborne Road is removed make sure it is replaced? Take out yellow lines in Munro Mews. During the night people leave vans along the street which makes it canyon like and lights in shops are left off. A few stalls should be allocated to young people (with a grant). Rubbish needs more civilized containers.
- Double parking is a problem – Keep community feeling
- Double parking is an issue. 'Traffic wardens are a mixed blessing'. Need more short term parking. Strange rules for residents about timings of pickups. Communal bins would help rubbish collection. Bags are often dumped around the Eurobins. Rubbish better now but shops put it out after 6.30 truck. Sometimes sweep Golborne Road but not side streets. More greenery please – trees and baskets.
- Take out traffic on Fridays and Saturdays. Best of both worlds – village community in an urban area with access to lots of resources. Build on social/cultural aspects of the community. Meanwhile Gardens along the canal is an important amenity, connections to which should be strengthened.
- The road is a rat run for cars. Make it a paved area – maybe more stalls – maybe retain ability to cycle. Problem with people parking on market days.
- Frequency of no. 23 bus seems slow. Access to the canal – park being improved.
- Need for short term double parking. More work needs to be done with stall holders rather than excessive enforcement.
- Morning peak hours, big problem. Need buses for schools. Hazardous to cross roads for pedestrians. Bad bus service no. 23 diverts around the area. Very low car ownership. Bad lighting on link to Westbourne Park. Some people are more likely to use Ladbroke Grove station even though it is further away. Need supermarket off Golborne Road such as a small Tesco type store

**Appendix 4:
Customer Survey Results**

Introduction

MVA were commissioned to carry out on-street surveys with people visiting Golborne Road. Interviews took place on Saturday 25th June, Sunday 26th June, Tuesday 28th June and Friday 1st July 2005.

The survey sought to discover:

- who visits Golborne Road;
- where visitors to Golborne Road come from;
- how visitors travel to Golborne Road;
- why people visit Golborne Road;
- what draws visitors to Golborne Road; and
- what facilities visitors use at Golborne Road.

The survey also asked visitors to Golborne Road:

- how they had first heard of the area;
- the best and worst things about the area; and
- what, if anything, they would like to change about the area

Interviews were achieved with 337 visitors to Golborne Road.

Summary of Findings

Two thirds of visitors to Golborne Road live in the local area, defined as within walking distance of the street (67%). A little over a quarter of visitors come from elsewhere in London (27%) and a further six per cent are visiting from elsewhere in the UK or overseas.

The main reason for visiting Golborne Road is to visit local shops (29%), followed by visits to the market (19%) and then to eat or drink at a local café, restaurant or pub (15%).

Visitors who patronise local shops or the market in Golborne Road are most likely to be shopping for food items. Other regular purchases such as newspapers and lottery tickets are also specified as purchases from local shops. Non-food or regular purchases are most likely to be clothes, shoes or accessories with thirteen per cent of shoppers making this purchase from local shops and over a third of visitors making a trip to the market for these items (35%).

The great majority of visitors to Golborne Road (94%) are on a day trip or less from home. A little over four per cent are on holiday and the remaining visitors are on business in the area.

Most visitors to Golborne Road visit the area more than once a week (59%).

Visitors are most likely to be staying in the Golborne Road area for more than two hours (48%) and then for up to one hour (35%) with the remainder of visitors in the area for between one and two hours.

Sixty per cent of visitors walk to Golborne Road. A little under a quarter of visitors reach Golborne Road by public transport using either a bus (13%) or a tube or rail service (10%). Sixteen per cent of visitors come by car and a small proportion of visitors cycle to Golborne Road.

A little over half of visitors to Golborne Road know of it because they live currently in the area (52%), with a further ten per cent having grown up in the area or known the area for some time. A little under a fifth of visitors have been specifically recommended to visit the area and a further eight per cent had heard about the area through press coverage or a guide book.

Visitors generally have very positive things to say about Golborne Road and few can name something they would like to change about the area. However crime in the area is a concern.

Visitors say the best things about Golborne Road are the people and the community atmosphere (18%), with a further fifteen per cent specifically mentioning the diversity and multi-cultural nature of the area. Eighteen per cent of visitors say the market is the best thing about Golborne Road.

The worst thing about Golborne Road relates to crime, whether this be awareness of a high crime rate, shootings, violence, drug crime or muggings (20%) but encouragingly a similar proportion of visitors (19%) say nothing is bad about the area. A further fifteen per cent say the worst thing is that the area is dirty or smelly or there is a lot of rubbish around.

When asked what they would like to change about Golborne Road over a third of visitors say either nothing or they do not know (35%). Sixteen per cent would like the area to be cleaned more regularly. Thirteen per cent would like to see measures to make the area safer including more police and CCTV. Eight per cent would like traffic improvements including traffic calming and more parking.

Half of visitors to Golborne Road (50%) are aged between twenty one and forty years. A little under a quarter of visitors are aged between forty one and fifty five years (24%).

Two thirds of visitors to Golborne Road (66%) are of white ethnic origin. A little under a fifth of visitors are of black ethnic origin (19%). The remaining fifteen per cent of visitors are of mixed, Asian or other ethnic origin.

Similar proportions of males (53%) and females (47%) visit Golborne Road.

Top Line Tables

The following pages present key findings from the Golborne Road survey.

Table 1 : All reasons for visiting Golborne Road

Respondents	304
Shopping at local shops	39%
Passing through/live here	34%
Shopping at the market	27%
Eating/drinking at local cafe/restaurant	24%
Education	21%
Look around the area	17%
Visiting friends or relatives	13%
Working in this area today	13%
Church/Mosque	13%
Personal business	11%
Car boot sale	3%
Gym	3%
Eating/drinking at local pub	3%
Cash point	5%
To look at a venue	3%
Doctor	3%
Library	3%
Launderette	3%
Base : All respondents - multiple choice	

Table 2 : Main reason for visiting Golborne Road

Respondents	336
Shopping at local shops	29%
Shopping at the market	19%
Eating/drinking at local cafe/restaurant	13%
Working in this area today	11%
Visiting friends or relatives	8%
Look around the area	7%
Passing through/live here	4%
Education	2%
Eating/drinking at local pub	2%
Church/Mosque	1%
Personal business	1%
Cashpoint	1%
Base : All respondents	

Table 3 : Main items shopping for at Golborne Road shops

Respondents	116
Food	64%
Newspaper	16%
Clothes/Shoes/Accessories	13%
Lottery ticket	5%
Cigarettes	5%
Souvenirs/Presents	5%
Antiques/Bric-a-Brac	4%
Medicine/prescriptions	3%
Hairdresser	3%
Soft drink	3%
Portuguese items	2%
Alcohol	2%
Camera	1%
Breakfast	1%
Post Office	1%
Household goods	1%
Toys	1%
Music/Videos/DVDs	1%

Base : Respondents who are visiting shops in Golborne Road - multiple answers given

Table 4 : Main items shopping for at Golborne Road market

Respondents	77
Food	65%
Clothes/Shoes/Accessories	35%
Souvenirs/Presents	14%
Household goods	5%
Music/Videos/DVDs	5%
Second hand clothes	3%
Camera	1%
Antiques/Bric-a-Brac	1%
Toiletries	1%
Suitcase	1%
Gadgets	1%
Sweets	1%
Pet supplies	1%

Base : Respondents who are visiting market in Golborne Road - multiple answers given

Table 5 : Cafe/Restaurant/Pub intend to visit at Golborne Road

Respondents	61
Lisboa	30%
Oporto	15%
Golborne Grove Restaurant	7%
Galicia	5%
Casa D'or cafe	5%
Cafe near market	3%
Cafe down the road	3%
Portugese cafe	3%
Not sure yet	3%
Lav Azza	3%
Moroccan grill	3%
Casa Santana	3%
St Mike's Bar	2%
George's chip shop	2%
Moroccan one	2%
Hummingbird bakery	2%
Armadillo cafe	2%
Mogador Restaurant	2%
Fish and chips	2%
Roadside food stall	2%
Cafe Grove	2%
Cafe Algarve	2%
Al Taglio	2%
Coffee Plant	2%

Base : Respondents who will visit cafe/restaurant/pub in Golborne Road - multiple answers given

Table 6 : How first heard of Golborne Road

Respondents	335
Live in area	50%
Recommended	19%
Reputation/press coverage/guidebook	8%
Known long time/grew up here	7%
Don't know	6%
Work here	4%
Known area for years	3%
When moved to area	2%
Through Portobello market	1%
Heard about Portugese shops/cafes	1%

Base : All respondents

Table 7 : Best thing about Golborne Road

Respondents	322
People/community/atmosphere	18%
Markets	18%
Multi-cultural/diverse	15%
Shops - convenience/variety	11%
Nothing	9%
Eating & drinking places	5%
Lively	4%
Convenient / close to home	3%
Don't know	3%
Cosmopolitan	3%
Variety of attractions	2%
Close to centre of London	1%
Local architecture	1%
Old items/second hand and rare items	1%
Foreign foods/Portugese shops	1%
Good for local transport nearby	1%
Easy to get around	1%
No chain stores/independent shops	1%
Homely/quiet	1%

Base : All respondents

Table 8 : Worst thing about Golborne Road

Respondents	323
Crime/shootings/drugs/muggings	20%
Nothing	19%
Dirty/rubbish around/smelly/polluted	15%
Traffic/parking problems	10%
Don't know	10%
Conflict/aggression/hostility/racism	5%
Crowds/too many people	3%
Youths hanging around/gangs	3%
Noise	3%
Run down/doesn't look nice	2%
Drunks	2%
Architecture	1%
Police	1%
Changing too fast/going upmarket	1%
Rents expensive/too much competition	1%
Not well lit at night	1%
Pubs close too early	1%
Lack of public transport	1%

Base : All respondents

Table 9 : Like to change about Golborne Road

Respondents	321
Nothing	23%
More regular cleaning	16%
Don't know	12%
Make safer/more police/CCTV	13%
Traffic calming / more parking	8%
Improve buildings	3%
Drugs	3%
Changes to market	2%
Less youths hanging around	2%
More community orientated	2%
Better variety of shops	2%
More buses/better tube access	2%
Drunks	2%
More facilities for young people	1%
More live music/gigs	1%
Improve education & training	1%
Less police	1%
Decrease price of market stalls	1%
Better lighting	1%
Reduce transport noise	1%
Reduce house prices	1%
More late night places to drink	1%
Open shops/market on Sunday	1%

Base : All respondents

Table 10 : Home Location

Respondents	337
Locally(walking distance)	66%
Elsewhere in London	27%
Outside London	3%
Abroad	3%

Table 11 : Length of Visit

Respondents	306
On a day trip (or less) from home	94%
On a short break / holiday	2%
On holiday (7days+)	3%
On business	2%

Table 12 : Length of Stay

Respondents	336
Less than 15 minutes	17%
16 to 30 minutes	9%
31 minutes to 1 hour	10%
Over 1, less than 2 hours	16%
Over 2, less than 3 hours	21%
More than 3 hours	28%

Table 13 : Main mode of travel to Golborne Road

Respondents	335
Walk	60%
Cycle	2%
Car	16%
Bus	13%
Tube/train	10%

Table 14 : Frequency of visits to Golborne Road

Respondents	312
Daily	46%
Several times a week	13%
Weekly	13%
Fortnightly	8%
Monthly	6%
Less than monthly	10%
First visit	4%

Table 15 : Gender Profile

Respondents	336
Male	53%
Female	47%

Table 16 : Age Profile

Respondents	337
Under 21	9%
21-40	50%
41-55	24%
Over 55	16%

Table 17 : Ethnic Profile

Respondents	336
White	66%
Mixed	8%
Asian	3%
Black	19%
Other	4%

Appendix 5: intelligent space

Pedestrian Movement Analysis and Retail Healthcheck
Benchmarking, 14 October 2005

1 Executive Summary

This report provides the findings of a pedestrian movement and land use analysis of the Golborne Road Market area. An on site pedestrian movement study was undertaken in September 2005, measuring flows in the area in order to identify how pedestrians currently use the area. Levels of pedestrian flow were also compared to averages from Intelligent Space's database of land uses in London, identifying what potential the 'movement economy' of Golborne Road provides for the sustainability of different land use types.

The key findings of the results are as follows:

- Flows on Golborne Road Market area has average 601 people per hour on weekdays and 1,048 people per hour on weekends.
- The significantly higher flows at the weekend are typically associated with markets. Overall pedestrian flows in market areas are two and half times higher at the weekend than they are on weekdays.
- During the week, Golborne Road is principally used by local community coming in from the surrounding residential streets. At the weekend, the main source of flows is from the Portobello Road market.
- The main land uses that are present in areas that have similar flows to Golborne Road are betting shops, charity shops, video outlets and off-licenses.
- The food and drink land use that are present in areas that have similar flows to Golborne Road are independent cafes and fast food outlets.

The report ends with some conclusions about the significance of the findings for planning the future of Golborne Road. In brief:

- The Golborne Road market is very dependent on its link to Portobello Road market, especially the presence of stalls at the northern end of Portobello. These stalls fill an area of blank facade with activity and create a link for movement. Removal of these stalls could significantly reduce the level of flows coming into Golborne Road market.
- The market appears to play a very significant role in raising the level of activity on Golborne Road. If it were to be removed, this could have a very negative effect on the economic viability of shops and catering outlets on the street.

Appendix 6: History of the Area

History of the street

During the 17th Century the area that now accommodates Golborne Road was forest and farm land which was used for rough grazing and ploughing. In the early stages of the 19th Century the Grand Union Canal was constructed together with the Great Western Railway which connected London with the west of England and Wales. In the later stages of the 19th Century Kensal New Town was developed to the north of the railway line and by the end of the Century nearly all the streets surrounding Golborne Road as well as Golborne Road itself had been constructed.

The early part of the 20th Century brought overcrowding and poverty to many people in London and the Golborne Road area was no exception. Only when the new housing act introduced in the 1930s required local authorities to tackle the issues were improvements made.

The area around Golborne was heavily bombed during the second world war due to the proximity of the railway line and other military facilities resulting in a number of direct hits as well as blast and fire damage.

In the 50s through to the late 1970s a high level of change was occurring around Golborne Road. Most of the housing stock was considered to be in a bad state of repair to the extent that many areas were identified for demolition. Even more demolition was required when the decision was taken to build the M40 motorway (Westway) through the area allowing easier access into London for those with a motorcar.

In the wake of the demolition new housing estates were built with Trellick Tower designed by Erno Goldfinger as the major landmark.

The community surrounding Golborne Road had always been home to newcomers into London seeking employment. Even from the very early days the area was welcoming people from a wide variety of different social and ethnic backgrounds. This did not happen without problems and race riots occurred in the 1950s where West Indian community became the focus of resentment. Presently the area has become the home for large numbers of Spanish, Portuguese and Moroccan communities. This ethnic mix is one key factor that contributes to the character of Golborne Road.

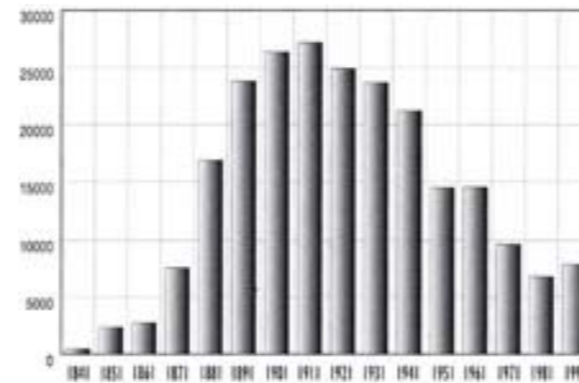
Socio-Economic Analysis

Population

A total of 174,400 people live in the Borough with an approximate 50-50 breakdown in terms of men and women.

More specifically to the Golborne area, population figures have fluctuated dramatically with a huge influx of people towards the end of the 19th

century which was connected with job losses in the countryside and job opportunities in the city brought about by the industrial revolution. This trend was later reversed in the early stages of the 20th century where people started to suffer illness due to the poor air quality and lack of proper sanitary facilities. This trend was further compounded by the second world war where in which London was heavily bombed.



Fluctuations in the population of Golborne
Source: (Jerome Borkwood) *Tales of the Inner City*

In terms of age, the majority of people who live in the Golborne Ward are between 20 and 44. The average age has been calculated at 33 which is considerably lower than the national average which stands at 38. It is also evident that a large proportion of the ward is single and has never married.

Golborne is characterised by the diversity of ethnic backgrounds of its residents. There are a wide variety of people from all around the world which helps to create a cosmopolitan feel. From the statistics it is clear that the majority of the population is white although there is a high proportion of black people particularly from Africa. Christianity is the predominant religion in the area although there is a significant proportion who are Muslim and atheist.

Employment

Within the borough a total of 123,000 people are within the working age bracket of which 86,000 are economically active. A large majority of this figure are employees but 16,000 are self-employed.

The average weekly earnings in the borough amount to approximately £600 which is significantly higher than the national level of £475.

The numbers of unemployed in the borough have been steadily decreasing since 2000. During that year a total of 3,500 people were unemployed in the borough but this has since been reduced to 2,500. This reflects the general trend in the UK and England but is significantly lower than when considering the average for London by itself.

Businesses in the Borough

The number of businesses in the Borough has been steadily growing since the early 1990s and is now approximately at the 10,000 mark. The types of businesses located in the area include real estate, public administration, manufacturing, wholesale/retail and hotel/restaurants. A large proportion of the businesses operating within the borough deal with real estate and represent a 41% share of VAT registered businesses.

In terms of number of employees, the distribution, hotel and restaurant sector provides the most employment opportunities within the borough which is also the case when considering the Golborne area by itself. The strength of this sector stands in contrast to the rest of London and Great Britain where this sector is much less dominant.

Education

The Golborne Ward accommodates a high proportion of school pupils and students who represent 12.3% of the population which is high in comparison to the national average which is 5.1%. The performance of pupils in the Borough has also been improving with 55.8% achieving five or more GCSEs and a higher proportion of younger pupils achieving a good level of proficiency in Maths and English. At a more general level, 30% of the population has no qualifications and 28% are highly qualified.

Housing

The majority of the Golborne population resides in households rather than communal establishments. A high proportion of these are single person households with the majority of properties being rented from the Council or Registered Social Landlord.

85% of households are accommodated in flats or maisonettes and 62% do not have a car, which is much higher than the national average of 19% and 29% respectively.

Health and Care

When asked about their general health the people living in Golborne gave the following answers:

64%	Good
23%	Fairly Good
12%	Not Good
21%	People with limiting long-term illness
20%	People of working age with a limiting long term illness
41%	Households with one or more person with a limiting long-term illness
10%	Provide unpaid care for family members and friends.

The death rate and the birth rate in the Borough is lower than the national average.

Disability allowance and attendance allowance are the two types of allowance that are available to people in the Borough. Within the Borough 2.6% of the population received disability allowance and 8.1% were given attendance allowance both of which are low in comparison to the national average which is 5.1% and 14.4% respectively.

Deprivation

Deprivation indices are measured through a combination of information relating to income, employment, education, health, skills and training. Kensington and Chelsea is ranked 116 out of 354 local authorities with the most deprived ranked as 1. The Golborne area is ranked 1,292 out of 32,482 sub-areas.